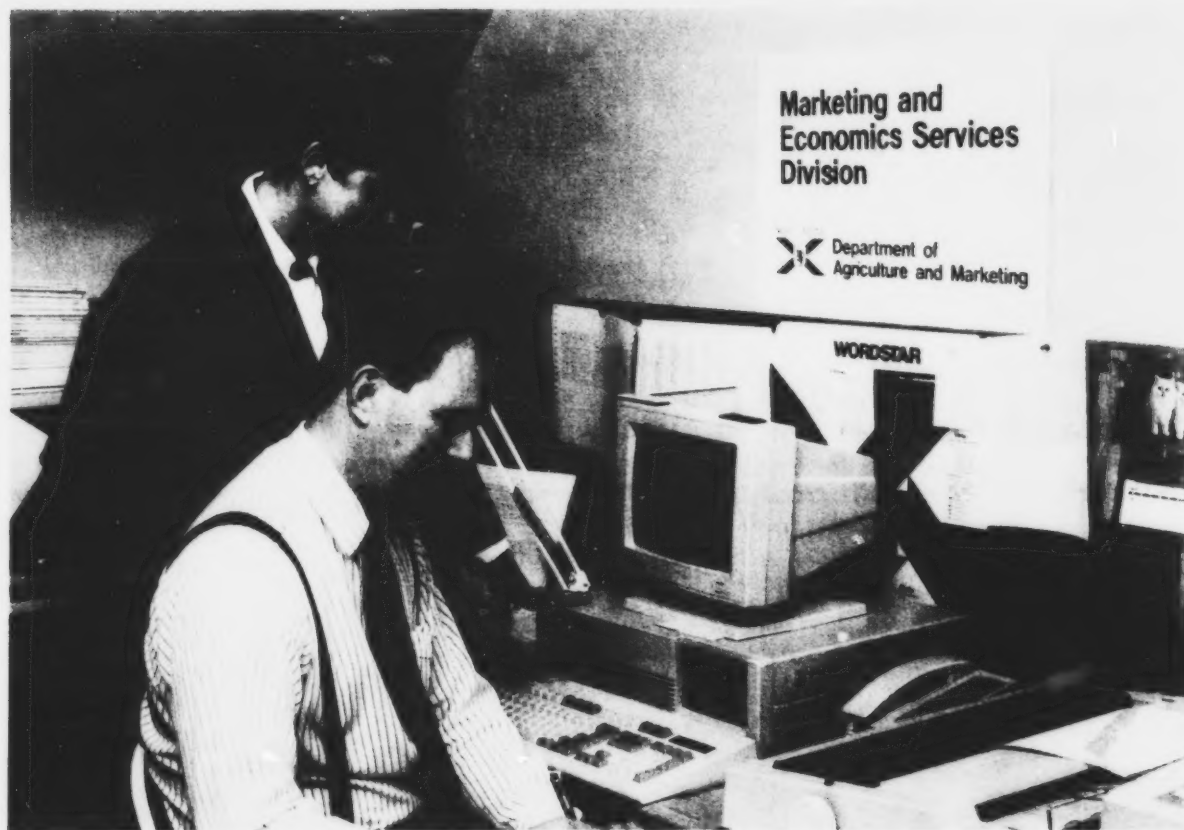


Nova Scotia



Department of
Agriculture and Marketing

Annual Report



Marketing and Economics Services
January 1st, 1988 to March 31st, 1989

TABLE OF CONTENTS

ANNUAL REPORT - January 1st, 1988 - March 31st, 1989

Introduction.....	1
Diagram of Staff.....	2

MARKETING INFORMATION & REGULATIONS

1. ECONOMICS.....	3
David E. Robinson, Economist	
2. MARKETING INFORMATION & REGULATIONS.....	8
David M. Smith, Marketing Specialist	
3. MARKETING RESEARCH.....	13
Shelley L.F. Manning, Market Research/Analyst	
4. N.S. NATURAL PRODUCTS MARKETING COUNCIL.....	18
G. Brian Smith, Secretary	

MARKET DEVELOPMENT

1. LIVESTOCK.....	20
Raymond P. Foote, Marketing Specialist	
2. FRUITS & VEGETABLES.....	29
Peter J. Rideout, Marketing Specialist	
3. FOODSERVICE.....	41
Linda D. MacDonald, Marketing Specialist	
4. PROMOTION.....	51
Laurie K. Thompson, Marketing Specialist	

AUDIO VISUAL/COMMUNICATIONS

1. A/V PRODUCTION - TECHNOLOGY.....	56
Sheila J. Ferguson, Information Officer	
2. GRAPHIC DESIGN & COMPUTER GRAPHICS.....	62
Cheryl S. Kienzle, Graphic Artist	
3. RADIO & A/V SERVICES.....	66
Micheline A. Gibson, Audio Visual Technician	

1988 Annual Report



**Department of
Agriculture and Marketing**

Marketing and Economics Services

The new cover and reporting format introduced in this annual report are the first indications that the Marketing and Economics Services has made positive changes in 1988. Changes to this Branch are not new. They have occurred ever since Marketing became a Department responsibility in the 1920's. Assisting the agri-food industry to market its product as efficiently as possible, and attempting to assure that our producers receive a fair return, is no simple matter. It requires all the resources and co-operation that the Department can muster. Changes in services are required to meet an ever changing and increasingly sophisticated clientele and market.

This report covers the fifteen months from January 1, 1988 to March 31, 1989. The reporting system was changed from one based on a calendar year to one based on the fiscal year.

We are pleased with the addition of three new staff members. Mary Paquet joined the Branch early in the new year to provide much needed stenographic services to the DeWolfe House. Laurie Thompson assumed the challenging position of Marketing Specialist (Promotions) on April 5, 1988, and our newest position of Market Research/Analyst was ably filled by Shelley Manning on April 18, 1988.

Intended to provide a better market information service, the ground work for a new section entitled "Market Information and Regulations" was laid in 1988. The Branch now has four sections, namely, Administration, Market Development, Audio Visual Services, and Market Information and Regulations. These are outlined in the staff organizational chart, as well as in the following reports.

The staff are a professional group of marketers dedicated to serving the marketing interests of the Nova Scotia agri-food industry. This is borne out by the accompanying reports. New directions can be noted in each report.

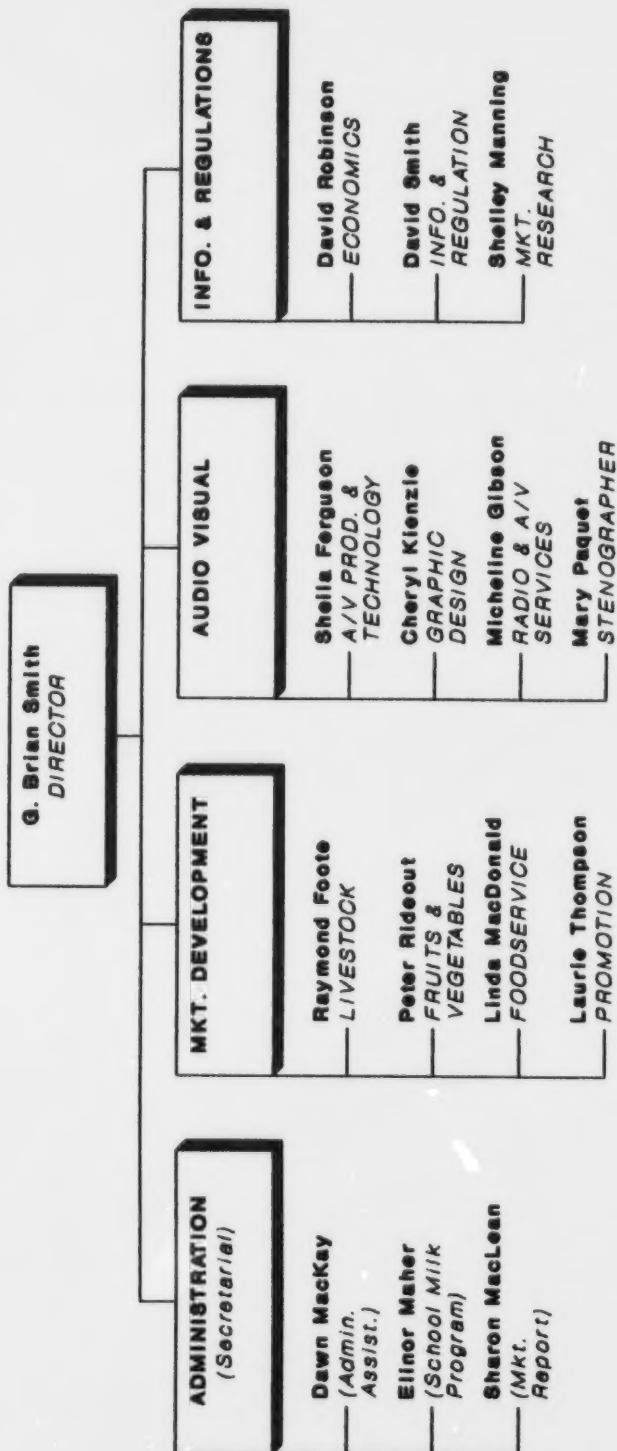
The changes and achievements reported herein are the result of a team effort which includes secretaries, technicians, casual employees and specialists. They would not be possible without the support and co-operation of the industry and the entire Department for which we serve. In submitting the 1988 Annual Report of the Marketing and Economics Services, we wish to give particular thanks to Ralph Morehouse, Deputy Minister; Dick Huggard, Executive Director; Branch Directors; and all Department staff for their co-operation, assistance and understanding.

Respectfully submitted,

G. Brian Smith, P.Ag.
Director

N.S. DEPT. OF AGRICULTURE & MARKETING

MARKETING & ECONOMICS SERVICES





MARKETING INFORMATION AND REGULATIONS ECONOMICS

1. Trade Negotiations

The Canada/U.S. Free Trade Agreement was signed and became effective during the January 1988 to March 1989 period. Three formal presentations were given to meetings on the trade agreement in 1988 (VPPANS, Bankers Conference, NSIA AIT workshop). A number of reports were prepared and matters researched related to the agreement and a brief article was written for Extension News. A number of international studies and papers on agricultural trade policy were reviewed.

Increased attention was further given to the Multilateral Trade Negotiations and the GATT during the year. Together with staff of the NSDIT&T, the MTN developments and possibilities were followed and assessed closely. The Federal-Provincial Working Group on MTN Agriculture (CCTN) and the NSFA Trade Committee provided the chief basis for industry and intergovernmental discussions and information exchanges. The Montreal Mid-Term Review Meetings were attended which provided opportunities for detailed briefings.

A discussion paper was prepared on the aggregate measures concept and some first approximations made of the provincial industry's relative position.

2. Feed Grain Policy and Cost Problems

Agriculture in Nova Scotia has faced severe cost competitive problems with respect to feed grains in the 1980's and continues to do so. Consequently these cost conditions and feed grain policy and related matters have continued to be a major area of involvement for economic analysis and policy development efforts (as has been the case for several years). A paper on our industry's feed cost problem and feed freight assistance was prepared and presented to the Canadian Agricultural Economics and Farm Management Society's annual meetings in Calgary.

The Nova Scotia Department of Agriculture and Marketing (NSDAM) was represented at meetings with industry representatives and federal officials in March 1988 (Halifax Airport), July (Halifax Airport), November (Ottawa, workshop) and March 1989 (Moncton, hearings). Four other working meetings were held with industry representatives on these matters. A major investigative study was undertaken on a number of historical and economic issues related to domestic feed grain and related policies as applied to Nova Scotia and the Maritime region. This was undertaken to aid industry groups in their preparation for the federal government's feed freight assistance review.* The Department's submission to the Feed Freight Assistance Review Committee was also prepared.

* The President of the NSFA described this report in March as "the best report on any thing that I have seen for us to work on."

Crop conditions during the summer presented the prospect that Ontario corn prices would advance substantially higher than US levels in the coming marketing year. This situation was analyzed and subsequently explained to the NSFA/NSDAM Feed Committee and later the NSFA Council of Leaders together with the role of the Canadian Countervail Duty on US corn in allowing Canadian prices to rise so much above international levels. The case and process for seeking a provincial exemption from the Canadian Import Tribunal was further developed and outlined. This was subsequently applied for in early autumn but the NSFA was informed in December that its case would not be considered at that time. Securing this exemption (as has been accomplished in British Columbia) would have saved Nova Scotia livestock and poultry producers \$2 million in 1988-89.

3. Dairy Industry Review Committee

A national dairy policy and industry review committee was established in late 1987 to hold hearings across Canada and to assess the current policy and industry situation and explore opportunities for improvements. The Province of Nova Scotia was represented on this group (together with dairy producer Bill McCurdy). Extensive hearings and meetings were held in nine provinces and over 50 presentations were made to the committee. The Province of Nova Scotia's submission was prepared for the review and assistance was given to industry groups in preparing their presentations. A statistical profile of the dairy industry in Nova Scotia was also put together for the Nova Scotia meeting with the national committee.

The committee gave in-depth consideration to issues surrounding interprovincial adjustments to market share quota (MSQ) allocations and also to quota policy provisions allowing for greater market orientation. While interprovincial MSQ adjustment was discussed and analyzed at length a comprehensive committee consensus was not reached. Direction was given for an ad hoc reconciliation of current impasses between plan signatories on this matter. The need for changes to make the plan more "market driven" was recognized and a policy for providing special MSQ allocations for market development purposes was developed and is being implemented on a trial basis by the Canadian Dairy Commission.

4. Agricultural Statistics

A provincial workshop was held on the Census of Agriculture. This was primarily intended to provide information to Statistics Canada on the needs of data users to help with the planning of the 1991 Census. The contents and uses of the 1986 Census were also outlined and discussed. Later in the year priority weightings were assigned to different format options for the next Census.

The contents of the annual statistics handbook was reviewed with Statistics Canada (Truro) during the year. New series on processing activity, food prices and expenditures, agricultural exports, commodity prices and the size, types and structures of farms were added.

5. Agricultural Stabilization

Service was given on the Nova Scotia Pork Price Stabilization Board during the year. Several forecasts were made of plan expenditures. The (interim) tripartite apple stabilization program required a national study of public support to apple growers. This was completed in the past year by a consultant under the direction of a steering committee. In addition to being on this committee the provincial data set was prepared. Several drafts of a similar red meat financial benefits accounting project were also reviewed.

6. Technical Papers

Two technical papers were presented at the annual meeting of the Canadian Agricultural Economics and Farm Management Society at the University of Calgary. These were "Feed Cost Problems and Feed Freight Assistance in Nova Scotia" and "Greenhouse Vegetable Markets and the Regional Impact of Large Scale (Publicly Assisted) Operation" prepared with D. Gordon, Dalhousie University. The abstracts of these papers are attached.

A third technical paper prepared with D. Gordon "Estimating the Price Impact of Regional Development Projects" has been accepted as an article by the Canadian Journal of Regional Science and will be published in the forthcoming edition.

7. Economic Reports

More of an on-going effort has been made in the last year to ensure that work areas and any in-depth analysis undertaken are reported in a final polished and presentable form for distribution and for future reference. The Economic Reports made available in 1988-89 were:

	<u>No.</u>
The Impact of Agricultural Exhibitions on the Economy of Nova Scotia (with M. Trott)	88-1
Research on Milk Promotion (with M. Trott)	88-2
Feed Cost Problems and Feed Freight Assistance in Nova Scotia	88-3
Greenhouse Vegetable Markets and the Regional Impact of Large Scale (Publicly Assisted) Operations (with D. Gordon)	88-4
The Impact of the Corn Countervail on Feed Costs in Nova Scotia	88-5
Aggregate Measures and the Multilateral Trade Negotiations on Agriculture	88-6
Discontinuities in Freight Equalization Policy	89-1
Farm Machinery and Equipment Inventories, Capital Investment and Operating Expenses in Nova Scotia (with P. Swinkels)	89-2

In addition, three presentations (which were never edited into formal Economic Reports) have been frequently requested and fairly widely circulated. These are:

Tripartite and Other Agricultural Stabilization/
Support Programs (March /88)

The Canada/US Trade Agreement, Credit Risk and
Nova Scotia Agriculture (March /88)

The Canada/US Trade Agreement and Implications
for Nova Scotia Vegetable Production (Jan. /88)

8. Miscellaneous

Presentations on the trade agreement with the US and on agricultural stabilization were given to the Bankers' Conference on Agriculture. A farm machinery market survey was prepared (with P. Swinkels) for distribution at the annual farm mechanization show in Moncton. Previous research on the regional market for greenhouse vegetables was updated and reviewed with the advisors of a proposed large scale development. An assessment was made of 1988 market price developments in this sector. Provincial data was prepared for a national study of public support of the horticultural sector. Plans were made for a mid-term review by the ALFI Evaluation Committee. Over 100 brief reports were prepared on a wide range of economic matters for internal departments and other purposes.

Submitted by:
David E. Robinson, P. Ag.
Economist

ABSTRACT
FEED COST PROBLEMS AND FEED FREIGHT ASSISTANCE
IN NOVA SCOTIA
D.E. Robinson

The position and interests of feeders in Nova Scotia with competitively determined output prices have been negatively affected by feed grain policy developments since 1976. Unclear policies and misleading signals have seriously compounded problems. Removal of cost increasing restrictions and improvement in the cost-effectiveness of equalization/assistance payments could improve their economic situation. The vulnerability of other producers to structural market changes demands a forward looking approach and long term efforts towards improved industry cost competitiveness.

The deficiency of past analysis of the effects of FFA has involved the omission of the implications for technical change. These may be particularly relevant in a small region with unique conditions. New technologies are expected to significantly lower feed input/output ratios this century. These will reduce feed ingredient transport costs per unit of livestock product. If such global developments were augmented by a more dynamic, regional environment for imported feed grain saving (broadly defined) technical change, significant progress may be achieved in reducing subsidy dependence and in restoring competitiveness.

The rapid technical gains which would alleviate high (relative) feed cost problems are less likely to be achieved in the presense of price distortions. If it is ever planned to terminate FFA, it would be highly advisable that the subsidy be restructured at least a decade in advance and preferably longer to remove input price distortions.

GREENHOUSE VEGETABLE MARKETS AND THE REGIONAL IMPACT
OF LARGE SCALE (Publicly Assisted) OPERATIONS

Daniel V. Gordon* and David E. Robinson

This paper surveys greenhouse vegetable markets with the emphasis on the seasonality and location of Canadian production, recent trends in production, market shares, product flows, and regional differences in product disappearance and prices. A model of demand and short-run price determination is estimated using monthly average wholesale prices at six eastern Canadian centres. Spatial price relationships, seasonality effects, relationships with imported field product prices and own price flexibilities are estimated.

This analysis is used to assess the price effects in the Maritime regional market of a large scale, publicly assisted, operation being developed in Newfoundland. At planned production levels and despite highly elastic demand, significant negative price effects are indicated. Industrial scale greenhouse vegetable operations have an apparent attraction for regional agencies in search of development opportunities. One purpose of this paper is to assist public and private decision making pertaining to such projects and proposals. The issues and problems of public assistance to industry when prices are endogeneous are highlighted.

* Dept. of Economics, Dalhousie University, Halifax, N.S.

MARKETING INFORMATION & REGULATIONS

MARKET INFORMATION

Market Report- This report of local agricultural product prices is assembled and mailed on a bi-weekly basis to approximately 1500 producer, government personnel and agri-business interests. This is approximately the same number as last year.

The February 26 mailing also included an annual summary of the previous year's prices. At the request of some readers, the October 7 issue included a detailed explanation of the pricing levels used in the Report.

The Comments section was continued this year. This provides an avenue to quote prices on low volume crops not normally reported in the main body. Also, other market news felt to be pertinent to the Nova Scotia market is reported here. On several occasions we received follow-up requests on items reported upon. The mailing list will be purged in 1989.

Market Update - This publication was continued in 1988 as three issues went forth.

Marketing Facts - One issue was published. This was an in-depth study of agricultural exports from Nova Scotia for the period 1984-1986. This was concurrent with a study of Canadian exports to the West Indies initiated in co-operation with the Department of External Affairs.

Other - This office continued to receive requests for price information on low-volume crops which were about to enter the market.

Visited our new asparagus grower on Caribou Island in the company of a Halifax Herald reporter. He did an excellent feature story on the operation.

Filled in for regular radio market reporter, Frank Mc Donald on two occasions reporting the market action at the Maritime Cattle Market.

Our fulfilling requests from academics for market information and research has been greatly eased by the addition to our staff of Market Researcher, Shelley Manning.

SCHOOL MILK PROGRAM

The School Milk Program continues to be well accepted by the school population. A total of 543 schools were registered with the Program out of an eligibility of 572 schools. This is down by four schools from last year but this was due to a reduction of eligible schools brought about by school closures.

Actual consumption of milk appeared to decline slightly as compared to the

previous year. Pay-out figures would indicate that 3% less milk was consumed. The Department's contribution to the Program was \$1,579,879 down from the previous year's \$1,640,061.

Although 99% of the participating schools report adequate refrigeration facilities, there is growing concern or complaints heard of warm and sour milk being served. As a consequence, milk sales are decreasing. It would appear there is a lack of co-ordination in the deliveries and/or dispensing the milk to the students.

Milk Nova Scotia, the industry-operated promotional arm of the dairy industry continued in an active program of milk promotion in the schools.

The 2% type continues to increase as the preferred type and now represents 52% of total consumption in the Program.

Since the last student price increase to 20 cents in September, 1986, the Program has endured four Dairy Commission increases in the wholesale price of milk.

Again we had letters of appreciation from segments of the Halifax Association For Improving the Conditions of the Poor. In our replies to these we clarified the Association's major contribution to this assistance.

TARIFF

This office continued to administer the seasonal tariff application and removal on imported fruits and vegetables into the Maritime Zone.

For the 1988-89 fiscal year the following tariffs were utilized:

Seasonal Tariff Utilization Maritime Zone

	<u>Applied</u>	<u>Cancelled</u>
Beans, Snap NOP	8/3	11/6
Beets NOP	8/3	3/24
Broccoli NOP	7/8	10/28
Cabbage NOP	4/1 7/8	5/2 1/31
Carrots NOP	8/5	3/21
Cauliflower	7/8	11/25
Corn	8/5	10/28
Lettuce	7/22	10/6
Onions green	7/22	12/23
Onions NOP	4/1	11/24
Pears NOP	8/26	2/11
Peas	7/22	10/14
Plums	8/26	11/18
Strawberries	7/8	9/2

We were advised by Hort. Council of several duty-drawback requests from proces-

sors who wished to import product because of lack of domestic supply.

One of these was for carrots. On this we contacted Oxford Frozen Foods. They in turn contacted the processor and a confidential arrangement was made.

With the onset of the Free Trade Agreement, this office has attempted to become acquainted with the workings of the FTA as it affects certain segments of Nova Scotia agriculture. We have published FTA information in the Market Report where we feel it is relevant.

REGULATIONS

As administrators and advisors to the Minister's office regarding the Nova Scotia Fruit and Vegetable Regulations we maintained our liaison with the federal inspectors who enforce our regulations.

During the year 87 detentions were issued by the inspectors at wholesale and shipping points. The products affected were mostly apples and a few potatoes. These were subsequently regraded, the culls dumped and the remainder released.

Act - We reviewed our Agriculture and Marketing Act with a view to up-dating. To this end we served on a committee of fellow Department staffers and some from the Attorney General's Department. We also prepared a suggested Section covering Marketing.

The exercise was subsequently shelved as the upcoming session of the House had a full agenda. We were further advised that in view of this, all preparatory work should cease.

Authorizations - An experimental authorization was granted for 2 1/4" minimum size on Cox Orange and Russet Apples.

An N. S. canner grade was authorized for field tomatoes permitting a 1 1/2" minimum size.

Authorization was granted for a "Miniature" potato having a size of 1 5/8" to 2".

Authorization was granted for a 5 lb. retail package of cranberries.

Authorization was granted for a 2 kg retail package for potatoes.

Authorization was granted for a Mini Grade potato having a maximum size of 1 1/2".

One request for 1/8, 1/4 and 1/2 bushel retail apple containers was refused as it lacked the support of the apple industry.

Sections 322, 33, 34 and 36 of the Fruit & Vegetable Regulations were rewritten and section 35 was revoked.

Interprovincial consignment selling is in the process of being regulated. It appears that Canada's recent efforts to have international consignment selling regulated has demanded this move to conform with the GATT agreement.

SPECIAL PROJECTS

Fresh Blueberry Market - On behalf of a group of fresh blueberry packers we convened two meetings to assist their marketing endeavours. The first meeting, held in July, was to examine market prospects and to discuss prices. The second was a post-market meeting at which market activity was analyzed. Approximately 246 tons of product were thus marketed; up from 205 tons the year before. This increase was noteworthy in view of the strong processor market. One or two packers were limited by the lack of sufficient grading and cleaning facilities to totally service their market demands. The market demand indicated consumers are favouring the well-cleaned pack vs the cheaper field cleaned pack.

Forest Mushrooms - The 1988 season proved to be an ideal growing season for forest mushrooms and in particular, chanterelles - lots of moisture and warm nights.

The marketing of the product was another matter. Because of the excessive moisture during the harvesting season, it was difficult to gather chanterelles in a dry enough condition to be acceptable for market. As a result of this, a large portion of the crop was discarded or went unharvested.

In spite of this, it is estimated that the 1988 market crop approached the 300,000 lb. mark. This came as a welcome relief to shippers who were prepared to pack it in after the dismal production of the last two seasons.

This year's production was so voluminous that shippers and receivers had to shut off receiving during the peak of the harvest season. This flush temporarily plugged all fresh markets and processing facilities. During this period picker prices fell from \$1.50 per lb. to 60 cents and only top quality clean, dry mushrooms were accepted.

The major shippers this year were Helross Products, New Glasgow and Albert Kral, Trenton.

AFDA Hay Market - Acted as project leader for Scotia Hay Co-Op Ltd. in an application to AFDA for funds to update their baler and to develop a market strategy.

The baler program was delayed to assess the economics of installing a more efficient, more expensive baler.

The market strategy study resulted in the installation of a permanent market manager who will also see to the assembly of product.

Cape Breton Resources - Manned an exhibit at Cape Breton Resources Exhibition where we promoted processed agricultural products.

MISCELLANEOUS

Atlantic Committee on Food - Attended the annual meeting of this group held in Charlottetown. Low selenium in Maritime diet was a major concern.

Beef Seminar - Filled in for Ray Foote at beef seminar in Cheticamp.

Maritime Farmers Conference - Attended a Free Trade Seminar organized by the Maritime Farmers Conference. This updated the Maritime industry in order that they could approach their MP's and MLA's with a better understanding of their concerns.

Special Crops Strategy - Met with Federal personnel and our Dwane Mellish regarding recent assessment by Federal government on research work done on special crops. Mellish opined that results of research was not forthcoming and long-term research was not adequate.

Interprovincial Trade Barriers - Represented Nova Scotia at national meeting. It was apparent that co-operation was needed to set up national food quality standards.

Nova Scotia standards parallel CAP Act standards. We have no processing regulations. Our dairy industry is working with other provinces towards harmonizing standards.

Horticultural Council - Attended annual meeting of CHC and served on several committees of that group.

Atlantic Winter Fair - Assisted in setting up booth and did two shifts in manning during the fair.

Milk Quota Sales - Regularly attended Maritime Cattle Market and along with livestock sales, we reported several milk quota sales. Prices for the latter ranged from \$325 to \$430. Time of the year seems significant in these sales as fall and winter sales trend low and then strengthen in spring.

Export Development Committee - This is a Crown Corporation funded by the private sector. They offer insurance protection on export sales. We attended a meeting where they gave their pitch to two potential strawberry plant exporters.

Submitted by:
David M. Smith, P. Ag.
Marketing Specialist

MARKETING RESEARCH

INTRODUCTION

The report to follow outlines the major initiatives and program activities undertaken by this office during the first year of programming in the area of market research. As the position is new the report will begin with a review of the duties and responsibilities of the market research/analyst, followed by a discussion of the activities carried out for the period April 18, 1988 to March 31, 1989. The activities can be categorized in the following manner:

- I General Duties and Responsibilities
- II Market Information
- III Market Research
- IV Special Conferences, Events and Seminars
- V Market Education and Extension

GENERAL DUTIES AND RESPONSIBILITIES

The general duties of this office include responsibility for the Branch's programs and services as they relate to agricultural marketing research and agricultural market and economic analysis, and to aid the Department and the Nova Scotia agri-food industry in planning, designing, implementing and interpreting market research and analysis as it pertains to agricultural commodities. This involves the review and assessment of current research and its relevance to the Nova Scotia agri-food industry as well as responding to the needs of our marketing specialists in the area of market research.

To date, the bulk of the projects and activities undertaken by this office have been initiated by the Specialists within the Branch and encompass a wide range of topics and commodities. This first year of programming in market research has been a challenging one.

MARKET INFORMATION

The Marketing & Economics Branch is one of the primary sources of timely market information for the agricultural industry and has thus made a substantial commitment to the provision of market information. This office has been involved with the review, assessment, and implementation of an electronic information service: The NSDAM Remote Bulletin Board System (RBBS).

The RBBS is quite simply a method of transmitting information electronically. It enables the timely transfer of information from one computer to another via telephone lines. In addition to the ability to access a variety of information, the rbbs can be used to communicate with users of the system.

Various bulletin board systems were evaluated with the assistance of Kathleen Layton (Department computer centre). The system that provided the greatest flexibility and met the majority of our needs was the RBBS-PC. This system allows multi-tasking and is reasonably easy to maintain. Our remote bulletin

board displays a number of news items, markets information, and farm management information. The information available includes livestock, fruit, vegetable, grain and feed prices. Our office has been most fortunate to obtain access to currently available prices. Our sources of information include the following: Alberta Agriculture, Ontario Cattlemens' Association, Canada Packers, Agriculture Canada, and Ontario Ministry of Agriculture and Food.

Alberta Agriculture

Pat Olsen of the Alberta Department of Agriculture has allowed us access to their weekly market report of Canadian and American livestock prices and grains and oilseeds prices.

Ontario Cattlemens' Association

Through contact with Information Officer, Ms. Elaine Pym we provide a weekly summary of computerized Ontario cattle markets, direct to packer prices, the OLEX electronic auction, and the Ontario Public Stockyard.

Canada Packers

Mr. Dale Tedford, Summerside, P.E.I. provides weekly quotations of feed grain prices at Atlantic delivery points.

Agriculture Canada

A weekly report of fruit and vegetable prices from Sydney and Halifax markets and daily livestock market prices from Canadian and American centres.

Ontario Ministry of Agriculture and Food

This office contacts the Ontario Food Terminal for a daily report of fruit and vegetable prices.

Nova Scotia Department of Agriculture and Marketing

We also prepare the Nova Scotia market report on a weekly basis. This has been achieved through the co-operation and assistance of our Sharon MacLean. In addition we have compiled monthly and annual price trends (the past five years) of the commodities recorded on our market report, as well as a running average of the current year's prices.

This office has evaluated a number of other sources of information for our bulletin board system.

Aq. Markets

This represents a combined effort of Agriculture Canada and I.P.Sharp and provides ten year data bases of agricultural markets. This information, although useful from a historical viewpoint, does not provide timely information. This source is also not economically feasible.

World Trade Centre Network

We have gained access to a bulletin board system that provides "offers to buy and sell" from 76 different World Trade Centres around the world. We have used this medium to advertise blueberries and apples and received a number of inquiries, mainly from the States with one from France.

Grassroots, Manitoba

This electronic system provides a variety of timely market information and historical data. The only shortcoming of this system is a copyright that prevents this office from freely distributing the information obtained.

The bulletin board system is currently available, from the Truro office, from 4:30 pm to 7:30 am Monday to Friday, and 24 hours on weekends. This is available to clients free of charge on the Truro exchange. This presents a problem to individuals outside of the Truro exchange and those wishing access during normal business hours. This office along with other members of our marketing staff evaluated the feasibility of toll free and 24 hour access. The costing of a datapac hook-up was estimated and a proposal was prepared for AFDA funding under the Market Information Sub-Program.

MARKET RESEARCH

This office has responded to requests from within the marketing department for various research projects. Major projects have been completed or are on-going with the Beef Industry, Modified Atmosphere Packaging, and the Maple Industry.

Beef Study

Working with the livestock specialist, Mr. Ray Foote, a survey on Nova Scotia consumers was designed and conducted during August of 1988. A total of 401 individuals were surveyed via telephone. The purpose of the project was to assess Nova Scotian attitudes towards beef, in particular their attitude towards a Nova Scotian beef product. In addition we wanted to ascertain Nova Scotians' perception of beef.

Modified Atmosphere Packaging

The Food Development Division of Agriculture Canada and various provincial agencies are jointly sponsoring study of the MAP technology to identify opportunities and constraints to its widespread use. This office acts as the liaison for Nova Scotia interests in this study and has been involved with all stages of the project.

The market component of this study provided an assessment of the market potential for MAP in Central and Western Canada. We prepared a proposal to secure funding (under AFDA) for the inclusion of a Nova Scotia component of the quantification stage of the study, ensuring interviews of 100 households in Halifax.

Maple Market Study

Working with promotion specialist, Laurie Thompson, this office conducted a survey of the maple producers in Nova Scotia to provide a profile of the industry. In addition we plan to conduct an on-site survey of consumers at the

maple festival. The combination of the two sources of data will provide us with the necessary information to evaluate the current marketing plan and assist in the development of a new one.

A number of smaller projects were completed by this office and are as follows:

School Milk Project - to determine the preferred container size and types of milk distributed through the Nova Scotia School Milk Program.

Exhibition Project - review of the marketing and management strategies of the managers of class A & B exhibitions.

Ontario Fluid Milk Prices - compiled a survey of fluid milk prices in Ontario to determine if the price of milk in Ontario chain stores was a "loss-leader".

Communication Questionnaire - distributed to commodity groups to determine their current market information needs and their capabilities to receive information via computer.

Lamb - tabulation of a survey conducted by our foodservice specialist, Linda MacDonald. The survey examined the use of lamb by restaurants in Nova Scotia.

Garlic - prepared as assessment of the market potential of garlic in Nova Scotia.

SPECIAL CONFERENCES, EVENTS AND SEMINARS

Institute of Canadian Advertising Seminar - Halifax, May 1988

Attended a one day program for marketing professionals designed to improve the development of marketing plans.

Social Trends in the Eighties - Halifax, October 1988

Attended a one day seminar by Statistics Canada presenting statistical information regarding trends.

Professional Marketing Research Society - Halifax, November 1988

Attended a one day program on the effective translation of research data into information for marketing decision making.

Modified Atmosphere Packaging session - Toronto, November 1988

This office met with the Hutchinson-Reid consulting firm regarding the MAP study. The two day session involved the conceptualization of products using MAP and defining the qualification stage of the research project.

Marketing Challenges '89 - Saskatoon, February 1989

This office participated in a three day marketing conference. This conference brought together all segments of the food marketing chain for a series of concurrent lectures on a number of related marketing topics, i.e. international trade, developing a marketing niche, export market opportunities, market research, etc.

Greenhouse Growers Association - Halifax, March 1989

This office attended a one day marketing seminar sponsored by the Greenhouse Growers Association.

MARKET EDUCATION AND EXTENSION

Staffing Department Exhibits

Staffed Branch exhibits at the Annapolis Valley Exhibition, August 1988 and the Atlantic Winter Fair, October 1988.

Exhibition Sub-committee

Served on this committee and completed assessments of two exhibitions; Annapolis Valley Exhibition and Musquodoboit Exhibition, August 1988.

Information Radio Releases

Releases on the remote bulletin board system and the beef research were scripted and released in co-operation with the Audio Visual section.

Farm Management Computer Course

This office prepared and presented a session on electronic communication at the farm management "Introduction to Computers" short course.

Remote Bulletin Board Workshops

With the assistance of Cheryl Baird (graphic artist), a slide presentation was developed to introduce small groups to the remote bulletin board system. This presentation was given in Truro, Kentville and Antigonish during March, 1989. The Farm Management Division assisted this effort by co-ordinating the three workshops.

Other educational activities included attending the annual meetings of the Vegetable and Potato Producer Association, the Maple Festival Committee and attending the 1989 APEX trade show.

CONCLUSION

This past year has been a fulfilling and challenging one. It has been occupied with responding to immediate requests for information and research, while attempting to further develop, and become comfortable with, this new position. It is hoped the efforts outlined in this report provide a strong foundation for the development of future activities in the area of market research. The support and assistance I have received this past year from the staff of the Marketing and Economic Branch is gratefully acknowledged.

Submitted by:
Shelley L.F. Manning, P. Ag.
Market Research/Analyst

N.S. NATURAL PRODUCTS MARKETING COUNCIL

Under the authority of the Natural Products Act of Nova Scotia, the Natural Products Marketing Council supervises the activities of the agricultural commodity marketing boards within the province. These Boards are mentioned below.

In the term in question, Council met sixteen times to deal with the concerns of the Boards. In the course of regular business there were five pricing appeals involving the Nova Scotia Turkey Marketing Board, one appeal over regulation decisions of the N.S.T.M.B. and three appeals involving regulations of the Nova Scotia Chicken Marketing Board.

During the year Council re-examined its own mandate and structure and sought answers to matters such as terms of office, honorariums, technical and administrative resources, consumer relationships, expectations of members and powers of Council. Through the year, Council sought to improve its relationship with the Boards. The Boards, and some of their concerns were as follows:

The Nova Scotia Egg & Pullet Producers Marketing Board

Meetings were held with the Board over levy increases and the declining financial situation of the Canadian Egg Marketing Agency. Council had concern over the level of surplus removal and the consumer levy while realizing that the debt has to be serviced. A signatory meeting was held in October, 1988 on pricing and amending the Federal-Provincial Agreement. Considerable discussion was spent over the Canada-U.S. Trade Agreement and the interpretation and reaction to Article 701.3. Council approved an amendment to allow transfer of quota without facilities.

The Nova Scotia Chicken Marketing Board

Several pricing arbitrations were dealt with by the chairman over the year. While producers continued to operate below their cost of production, processors and the fast food industry experienced outside pressures to remain competitive. Concern developed over the growing problems between British Columbia and the Canadian Chicken Marketing Agency and the intended withdrawal of British Columbia from the Agency.

The Nova Scotia Turkey Producers Marketing Board

Council's direct involvement since August, 1988 has been limited with regard to pricing disputes. An interim agreement was struck on a pricing formula.

The Nova Scotia Fruit Growers Association

Several meetings were held with the N.S.F.G.A. and members of the industry over the request of the N.S.F.G.A. to form a Nova Scotia Apple Marketing Plan. A vote was conducted in August, 1988 and the Plan was narrowly defeated with 63.8% voting in favour. Due to the closeness of the vote, the N.S.F.G.A. requested another vote to be held in May, 1989.

The Nova Scotia Potato Marketing Board

A plebescite was conducted to determine the support for a national potato agency. Nova Scotia producers voted 68% in favour of pursuing the idea. The National consensus was 72% in favour. Amendments were made to the Provincial Plan to increase the licensing fees and to define pricing powers over table potatoes.

The Nova Scotia Pork Producers Marketing Board

A special meeting was held to address the financial and credit limits of the Board and the implications that the new national tripartite program would have.

The Nova Scotia Winter Grain Marketing Board

Ninety spring wheat producers voted 92% in favour of joining the plan. The Plan was amended to accomodate winter wheat, spring wheat and rye. The Board will hence be known as the Nova Scotia Grain Marketing Board.

The Nova Scotia Lamb Marketing Board

Dialogue continued on the suggestion that the Sheep Producers Association of Nova Scotia be amalgamated into the Board.

The Nova Scotia Pea & Bean Growers Marketing Board

The Councils involvement consisted of arbitrating a crop price.

The Nova Scotia Flue Cured Tobacco Growers Marketing Board

Council approved a motion of the Board to borrow under the Advance Payment for Crops Act.

The Nova Scotia Greenhouse Vegetable Marketing Board

On July 29, 1988 this newest Board was formed. The Board was in the process of organizing itself among the 15 producers. 77% had voted in approval of the Plan.

The Nova Scotia Evening Primrose Marketing Board

The Board has not been active in the past year.

Submitted by:
G. Brian Smith
Secretary, N.S.N.P.M.C.

MARKET DEVELOPMENT

LIVESTOCK

PROGRAM REVIEW: JANUARY 1, 1988 TO MARCH 31, 1989

The projects and programs recorded in part reflect activities undertaken in food marketing, with a primary focus on red meats, poultry, dairy products, livestock marketing and markets information.

This office continued to act as budget manager for the Hog Transportation Policy and the Pork Price Stabilization Program. Secretariat Services continued to the EDP Committee and the Audit Sub-Committee of the Department Exhibition Committee. In addition, duties were assumed as Secretary and Advisor to the Dairy Cattle Sales Society and the Inspected Meat Plants Association of Nova Scotia. This office also served as a resource for the Meat Inspection Advisory Committee of the N. S. Meat Inspection Act.

Requests for information, material and/or advisory assistance continues to broaden in scope and range as agriculture diversifies. Department personnel, industry trade associations, interdepartmental groups and committees on a provincial and interprovincial basis are seeking markets information to access funding from federal and provincial programs.

CLIENT SERVICES:

Specific market assessments and profiles were undertaken for industry and other agencies during the year. The range and scope of management information developed by this office would be diminished were it not for the support of Elinor Maher, Sharon MacLean and Claire Hanlon (casual term). Over the review period the following activities or reports were undertaken:

- Ad track commodity features series was released quarterly with a 1988 annual.
- Countervail duty questionnaire responses for hogs were completed in May and September of 1988 and January 1989.
- Processed Pork Countervail Duty Petition and defence to the International Trade Administration of the U.S. Dept. of Commerce and U.S. International Trade Commission.
- Non traditional poultry market demand surveys were completed at retail and food service.
- Price and volume chart series was released quarterly with a 1988 annual
- A provincial consumer survey regarding beef was designed and completed.
- Dairy goat assessments were completed with farm tours and meetings in P.E.I., Ontario and Nova Scotia.
- Agriculture & food exports of Nova Scotia origin to all countries, 1984-86, were compiled by product and value.
- A market profile for Nova Scotia ice cream was undertaken focusing on the categories, packaging, pricing and flavours.
- An evaluation report on the 1987 Turkey Co-operative Advertising Program was completed.
- An assessment of organic foods on the range of products, prices and acceptance was undertaken in Toronto.

- Ad track templates were completed on Lotus 1-2-3 to calculate pork, lamb, beef and chicken cut advertising frequency for retail stores surveyed.

MARKET EDUCATION AND EXTENSION:

This office co-operated with the regional Ag Reps by participating in a series of producer meetings including:

- Dairy Goat Information Meeting, March 24, Windsor
- Markets Information Meeting, April 13, Bridgewater
- Livestock Producer Meeting, May 31, Whycocomagh
- Sheep Producers Assn. Annual Meeting, November 19
- Nova Scotia Cattlemen's Assn. Annual Meeting, November 21
- Commercial Rabbit Producers Assn. Meeting, January 16
- Pictou County Federation of Agriculture Meetings, February 7
- Pictou County of Agriculture Meetings, February 8
- Presentations were developed on meat marketing trends in Atlantic Canada and the agri food sector's capacity to deliver for Co-op Atlantic management seminars for Eastern Nova Scotia (Sydney) and Newfoundland (Gander), February and March
- Annapolis Valley Beef Producers Assn. Meeting, March 9
- Beef Information Days, March 13 & 14, Newcombville and The Forties.

AUDIO VISUAL AND EXHIBIT MATERIALS - Developed for Branch and client use in 1988, slides, charts, graphs and tables in co-operation with other Branch members.

INFORMATION RADIO RELEASES - Releases on livestock and meat product topics were scripted and released as requested by Audio Visual section.

LIVESTOCK MARKET REPORT - Supervised the Branch-sponsored weekly radio livestock price information program produced by Frank MacDonald, Truro, and released via Nova Scotia Government Services channels. This successful program is carried as a public service by the majority of the Nova Scotia radio stations.

STAFFING DEPARTMENT EXHIBITS - Staffed Branch exhibits for Marketing Days at the Annapolis County Exhibition and at the Atlantic Winter Fair.

PROFESSIONAL DEVELOPMENT:

Workshop - Survey Methods and Questionnaire Design, Statistics Canada, March 88

Free Trade Seminar - Canadian Exporters Association, January 1989

Diploma in Adult Education - St. F.X. (completed two of six modules, January and March 1989)

WORKTRIPS:

Third Canadian Meat Science Association Symposium
Quebec City, February 1988

The focus of this Third Annual Symposium was modified atmosphere packaging. It was evident all speakers felt that modified atmosphere packaging of fresh meat at the wholesale level is here to stay. At the retail level, the increased

advantage of modified atmosphere packaged fresh meats is not as clear as the consumer does not appear to accept the advantage of fresh meat having a refrigerator life of ten days after purchase. In other product categories (processed and prepared foods) the symposium appeared concerned that MAP is technology pushed rather than demand pulled.

Copies of presentations received were circulated to co-workers in Marketing and Economics, Livestock Services and industry. This office was asked to serve on the Education Committee chaired by Dr. Steve Morgan-Jones, Lacombe Research Station.

68th Canadian Meat Council
Quebec City, February 1988

Joined industry and government personnel in a lively interactive program focusing on programs to enhance beef and pork quality with pre-slaughter management programs, carcass handling systems and consumer research. Papers obtained at the sessions were circulated to Marketing and Economics, Livestock Services and the trade.

Canadian Livestock Market Information Advisory Committee
Quebec City, February 1988

Provided a regional report to Committee members on provincial initiatives to improve markets and management information through electronic medium. The membership of red meat producers and government representatives participated in a free flowing exchange on current and pending technology for electronic price reporting. The central focus was the completeness and comparability of price data generated and reported throughout Canada. A committee generated report on the Canadian veal industry was reviewed. The inability of the working committee to implement a wholesale boxed beef reporting system was discussed.

16th Annual Food and Equipment Exposition and Caribbean Investigative Travel,
April 1988

San Juan, Puerto Rico; Kingston, Jamaica; Bermuda

This office joined six Nova Scotia companies, the Government of Canada and three exhibitors each from P.E.I. and New Brunswick in this market development initiative. Nova Scotia companies generated 70% of the sales in the Canadian Pavilion at the show. Valuable distribution, retail and foodservice contacts were established and opportunities were evident for prepared food and livestock breeding stock sales to the area. Contacts were established with government, non-government agency officials and introductions made with distribution and retail personnel in Puerto Rico, Jamaica and Bermuda.

The North American Spring National Dairy Show

Connecticut, April 1988

This office accompanied Jerome McCarron, Livestock Branch; Elmer Buchanan, Dairy Cattle Sales Society; and Harold Roper, Farm Focus; in breeder contact in Maine, Vermont, New Hampshire and Massachusetts. These on-farm visits coincided with the participation of a Nova Scotia breeders herd exhibit at the Spring Show. The Show established Nova Scotia's with principal Holstein and Jersey dairy herds in the New England States. The DCSS information exhibit was well received.

Strategies for Success III, Focus on Beef Quality
Alberta, October

This project of the Education Committee, CMSA, expanded to a total industry

event co-sponsored by the Canadian Meat Packers Council, Beef Information Centre of Canada, and CMSA. One hundred and fifty people from across Canada turned out for this two-day seminar. The total industry participated in the program and five of the ten member plants of the Inspected Meat Plants Association attended.

Alberta Industry Tour October

The five plant participants in this tour visited auction marts, the Lacombe Research facility, custom feed lots, Lambco, twelve provincially inspected meat slaughter and processing facilities, plus information meetings with Alberta Meat Hygiene personnel. For the most part, representatives on the tour viewed actual applications of slaughter and processing technologies adaptable to the Nova Scotia situation.

60th Annual Royal Winter Fair Toronto, November

In co-operation with the industry and the Livestock Branch two provincial herds participated in the event. The Dairy Cattle Sales Society of Nova Scotia was pleased to meet a national audience with information exhibits placed with both provincial herds.

AD TRACK SERIES:

The Marketing and Economics Branch continues to monitor retail food store ads. The fourth annual summary of meat department ads has been completed. Highlights follow.

	<u>COMMODITY AD FREQUENCY - 1988</u>			
	1ST QTR	2ND QTR	3RD QTR	4TH QTR
PROCESSED MEATS	563	427	387	286
BEEF	187	201	109	102
FRESH PORK	115	113	91	56
CURED PORK	99	105	67	57
CHICKEN	93	89	61	29
TURKEY	52	46	30	33
OFFAL	27	29	25	18
FISH	27	30	17	19
LAMB	14	8	11	8
VEAL	1	0	2	0
DUCK	0	0	2	2
GEESE	0	1	0	1
TOTAL	1178	1049	802	611

	<u>% GROCERY ADS WITH MEAT ITEMS</u>	
	1988	1987
FIRST QUARTER	72%	78%
SECOND QUARTER	61%	62%
THIRD QUARTER	92%	60%
FOURTH QUARTER	76%	46%
AVERAGE	75%	61%

DATA BASES/MARKET GRAPH SERIES:

During 1988/89 data bases were maintained for the following information and allowed for quarterly and annual reports tracking market information focusing

1. Weekly Rail Grade A1/2 Steer bids, Calgary, Toronto & Truro
2. A1/2 Slaughter Steer Prices, Toronto & Truro
3. A1/2 Slaughter Heifer Prices, Toronto & Truro
4. Weekly Live Price 95 lbs.+ lamb, Calgary, Toronto & Truro
5. Weekly Lamb Volume, Truro
6. Weekly Feeder Steer Prices, 700+, Edmonton, Toronto & Truro
7. Weekly Feeder Steer Prices, 500+, Edmonton, Toronto & Truro
8. Weekly Feeder Steer Prices, 400+, Edmonton, Toronto & Truro
9. Weekly Wholesale Beef/Steer Carcass Prices A1/2, Montreal, Calgary and Atlantic 10.Cash Hog Prices, Index 100, Alberta, Ontario and Omaha
11. Weekly Choice Slaughter Steer Prices, Oklahoma & Toronto
12. Weekly D1/2 Slaughter Cow Prices, Edmonton, Toronto & Truro
13. Weekly D3 Slaughter Cow Prices, Edmonton, Toronto & Truro
14. Weekly Wholesale Dressed D1 prices, Montreal, Toronto & Atlantic
15. Veal Calves Volume Weekly numbers and prices, Truro
16. Atlantic Volumes Inspected Slaughter, N.S. origin, for cattle, calves, swine and lamb on a weekly basis
17. Weekly Canadian Processed Egg Production, volume of total liquid break, whole egg and sold as liquid
19. Cattle Volume, Maritime Cattle Market

Interest from various sectors for this type of information tracking is increasing, as this graph series is circulated. Maintenance of the data bases and creation of the graphs are placing further demands on a support staff already strapped for time. As the human resources are available, this series will be placed on the RBBS-PC.

RBBS-PC:

The Branch inaugurated a Remote Bulletin Board Service to improve the timeliness of markets information for the agrifood community in Nova Scotia.

An AFDA project is currently underway to provide public access through a datapac number for the province. This will allow 24 hour a day, 7 day a week, multi user access to the RBBS-PC. This extension in service will go a long way in establishing the electronic medium as a viable means to obtain management information. Marketing and Economics feels this access is critical to the establishment of the legitimacy of the price and volume data provided on the system.

CONSUMER MARKET RESEARCH 1988:

The Marketing and Economics Branch conducted consumer sensory and attitude evaluations in 1988. A major research project entitled "Nova Scotia Beef Consumption Patterns, Qualitative Assessment of Consumer Attitudes and its Perceptions" was completed with Shelley Manning. The survey, undertaken by Shelley, established a bench mark regarding Nova Scotia attitudes and perceptions of the beef it consumes. Important information was gained to allow meaningful discussions with producers, processors and retailers regarding the available market in Nova Scotia.

In a sensory evaluation project at Food Fair Atlantic 1988, a stratified sample of consumers was tested on the acceptability of Nova Scotia unflavoured, cooked beef, well done and medium done. Visual and tactile attributes were scored in conjunction with a purchase rating survey.

PROCESSOR-DISTRIBUTOR-RETAIL CONTACT:

Contact was maintained with a cross-section of general management, sales and production personnel at red and poultry meat processor and distributor level in Atlantic Canada.

With retail consolidation and centralized buying programs dominating the retail scene, this office maintains ongoing contact with the head office staff of Sobeys, Co-op Atlantic, Atlantic Wholesalers, Bolands I.G.A., and subsidiaries.

LIVESTOCK AUCTIONS:

- Maritime Cattle Market
- Hants Livestock Sales
- Lawrencetown Federation Sale

The Maritime Cattle Market continues to perform a valuable service for the livestock industry. Although 90% of the red brand beef is purchased by private treaty, the clearing house function is essential for all classes. The three small provincial sale barns and the many specialized sales provide essential services for those producers who utilize them.

MARITIME CATTLE MARKET VOLUME SUMMARY - Cattle & Calf Volume Number of Head (By Type)

<u>YEAR</u>	<u>TOTAL OF CATTLE/CALVES</u>	<u>STEERS & HEIFERS</u>	<u>SLAUGHTER COWS</u>	<u>BULLS</u>	<u>VEAL</u>	<u>BOB CALVES</u>	<u>FEEDERS</u>	<u>DAIRY REPLACEMENTS</u>
1984	21,839	1025	2972	264	1967	7628	5816	2167
1985	24,759	1231	3721	231	1982	8510	6688	2396
1986	28,790	1106	3510	246	2010	11373	7928	2617
1987	29,941	931	3777	203	2122	10640	9024	3244
1988	27,286	800	2825	277	2568	11199	7225	2392

CATTLE & CALF VOLUME - BY TYPE (Expressed in Percentages) SLAUGHTER

<u>YEAR</u>	<u>TOTAL OF CATTLE/CALVES</u>	<u>STEERS & HEIFERS</u>	<u>SLAUGHTER COWS</u>	<u>BULLS</u>	<u>VEAL</u>	<u>BOB CALVES</u>	<u>FEEDERS</u>	<u>REPLACEMENTS</u>
1984		5%	14%	1%	9%	35%	27%	9%
1985		5	15	1	8	34	27	10
1986		4	12	1	7	40	28	8
1987		3	13	<1	7	36	30	11
1988		3	10	1	9	41	26	9

INTERGOVERNMENTAL LIAISON:

This office continues to interact on a request and enquiry basis with a series of federal and provincial agencies. This work includes consultant services to regulatory and funding agencies.

PROVINCIAL MEAT PLANTS ASSOCIATION FORMED:

The nine provincially inspected plants in Nova Scotia unanimously voted to form an affinity group to:

1. improve relations among themselves
2. promote their services to the public
3. undertake projects of mutual advantage (for example form a supplier buying group) and do yield tests for pricing data; work with producer organizations for specification animals
4. to act as an information house to centrally clear material
5. to facilitate management and staff professional development and training
6. to lobby for extension inspection to cover cutting rooms and be available to processing only facilities.

Membership is open to all plants licensed under the Nova Scotia Meat Inspection Act. A co-operative advertising campaign was undertaken in the fall and several joint member projects are under investigation.

Member plants market significant volumes of beef, calves, lamb of Nova Scotia origin, and a smaller portion of swine. The accompanying table reviews the situation.

VOLUME INSPECTED SLAUGHTER NOVA SCOTIA ORIGIN

	CATTLE	CALVES	SWINE	LAMB
TOTAL ATLANTIC ANNUAL SLAUGHTER*	20,435	2,566	239,514	5703
AVERAGE WEEKLY SLAUGHTER - 1st Qtr.	379	54	4,742	91
2nd Qtr.	375	39	4,573	94
3rd Qtr.	303	43	4,443	116
4th Qtr.	516	62	4,666	138
ANNUAL AVERAGE WEEKLY SLAUGHTER	393	49	4,606	110
% OF TOTAL SLAUGHTER AT IMPA PLANTS	30%	82%	5%	75%

* Excludes sheep & other

NOVA SCOTIA PORK STABILIZATION:

This office continued to act as recording and corresponding secretary for the Board in 1988/89. This involved agenda development and minutes to quarterly meetings, handling requests for policy and financial information on the Plan from outside agencies.

Shipments by provincial clubs were up 4% for fiscal 1987/88. Shifts in production are evident.

HOG SHIPPING CLUB RESULTS BY COUNTY 1987/1988

<u>COUNTY</u>	<u>CLUBS</u>	<u>CLUB VOLUME</u>	<u>COUNTY VOLUME</u>
ANTIGONISH	ANTIGONISH	5908	5907
PICTOU	SCOTSBURN	4725	4725
COLCHESTER*	COLCHESTER	12732	17345
	SUNRISE	4613	
CUMBERLAND	BORDER	3315	8685
	NORTHUMBERLAND	5370	
HALIFAX	EAST HALIFAX	569	569
HANTS	WINDSOR	8943	8943
KINGS	EAST KINGS	79571	136643
	WEST KINGS	57072	
ANNAPOLIS	WESTERN VALLEY	13735	13735
DIGBY**	CLARE	28134	32053
	CLARE-ANNAPOLIS	3919	
LUNENBURG	SOUTH SHORE	4784	4784

			TOTAL 233390

* INCLUDES SHUBENACADIE

** INCLUDES QUEENS CO.

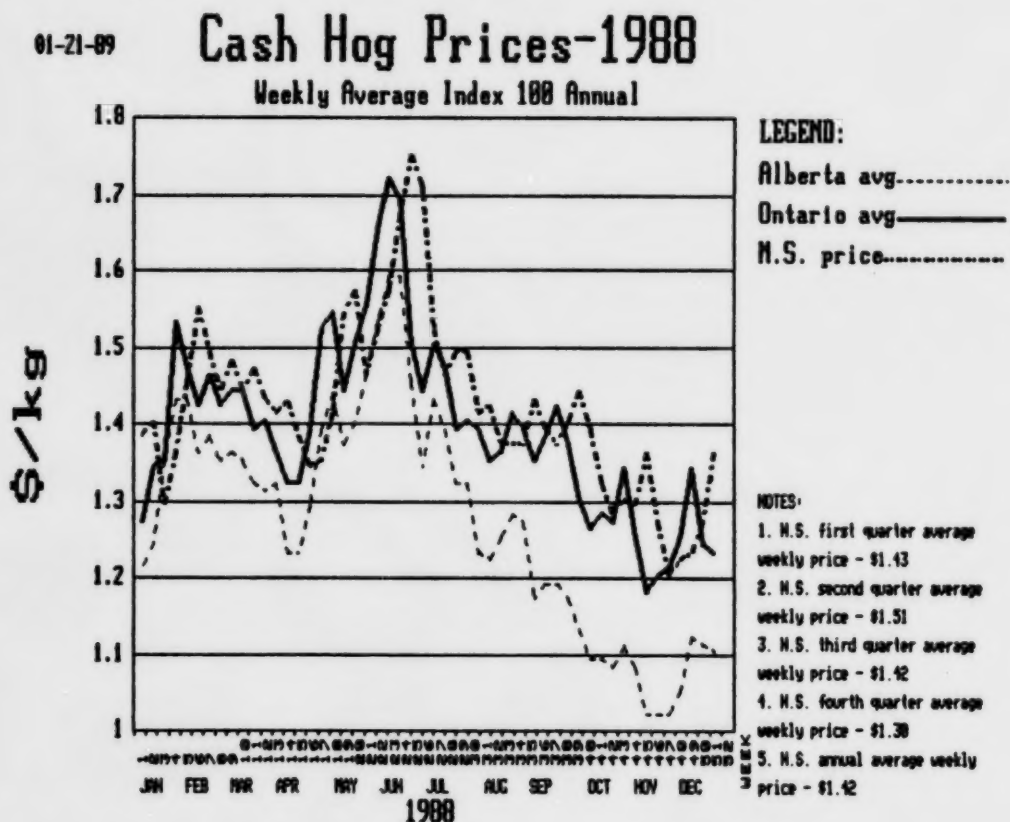
COUNTY	PRODUCTION CHANGE 87/88 over 86/87
ANTIGONISH	up 21%
PICTOU	down 13%
COLCHESTER	down 2%
CUMBERLAND	up 7%
HALIFAX	down 7%
HANTS	up 2%
KINGS	up 7%
ANNAPOLIS	down 3%
DIGBY	up 3%
LUNENBURG	down 3%

The Stabilization Plan completed its mandate March 31, 1989, as producers and the province of Nova Scotia joined Tri-Partite Stabilization. The quarterly coverage for 1988/89 was:

1988	1st Quarter	\$73.00
	2nd Quarter	75.00
	3rd Quarter	75.25
	4th Quarter	83.00
1989	1st Quarter	89.00

At expiration, eligibility records indicated approximately 200 pork producers were enrolled in the Program. One hundred and fifty producers were shipping weekly.

The accompanying graph, generated from our data base, illustrates weekly cash pork prices on Canadian and U.S. markets for 1988.



AFDA MARKET DEVELOPMENT:

The demand on time to assist clients in completing applications and subsequent Project Supervision has resulted in additional strain on available time. The volume of inquiries continues to grow.

Submitted by:
R.P. Foote, P.Ag., Marketing Specialist

FRUITS AND VEGETABLES

ABSTRACT

The year 1988 saw no further growth in the province's agricultural industry's steadily increasing demand for more comprehensive advisory services from the Marketing & Economics Branch. The growing marketing sophistication of our clients in the horticulture sector places new challenges before us in assisting this industry in an internationally competitive marketplace.

A number of program activities highlighted the year for the Kentville office. We assisted in the staging of the highly-successful Food Marketing Challenges '88 conference in March and became involved as leader of more than a dozen projects under AFDA II shortly after its August signing. We organized a very well-attended seminar on Post-Harvest Handling of Horticultural Crops with Dr. Robert Kasmire in December. Perhaps most satisfying was the development of close working relationships in an advisory capacity with several key clients and organizations in the horticultural sector.

MARKET DEVELOPMENT

Extension

Our marketing extension services continue to take various forms. The provision of confidential marketing advice to individual clients is our fastest-growing role, and the most challenging.

We worked closely with Scotian Gold Co-operative Ltd. in 1988 in the course of re-structuring to a solely fresh apple marketing firm. This included serving in a small Planning and Development Committee, designing a marketing program for Gravensteins in western Canada, working with consultants on a new corporate identity program and assisting in the movement of processing fruit to out-of-province customers.

A number of consultations were held with clients in other marketing initiatives for horticultural crops. These included Kings Produce Ltd., Riverbrook Farms (G.Coldwell), Hennigars Farm Market, Appleberry Farms (A. Woodworth), Webster Farms, Mawson Baltzer and several others, most of which led to projects under the AFDA II Market Development Program.

Short courses and seminars are one of our most popular educational tools and we participated in several in addition to the regular commodity association meetings. These included the Lunenburg County marketing seminar, the tree fruit short course (discussion of pear markets) and the Garden Centre/Farm Market training session.

Our most successful market extension activity was a series of consultations and a seminar by Dr. Robert Kasmire, the well-known post-harvest specialist from the University of California, Davis, in December. We conducted two full days of farm calls along with Dr. Robert Prange, Agriculture Canada and the seminar was attended by over 80 people from around the Maritimes. Post-harvest handling is still below standard in Nova Scotia and is a major constraint to the horticulture industry. The enthusiasm created by Dr. Kasmire's visit will lead to several projects in this area in 1989.

A new format radio tape program was started by the Branch in 1988 with Laurie Thompson acting as interviewer/host. We prepared several of these on timely horticultural marketing issues.

Market Information

The introduction of a computer-based remote bulletin board service (RBBS) greatly improved the branch's market information capabilities. Subscribers with properly equipped micro-computers can now dial up and receive daily-updated reports on most agricultural commodities.

Fourteen (14) issues of our weekly Fresh Produce Supply Forecast were published in 1988. The Forecast is mailed to some 200 subscribers, mostly in the produce trade and news media, primarily to give notice of coming local produce supplies and market outlook.

The "Market Line" recorded fruit and vegetable report was once again operated from the Kentville office under the management of summer assistants Tina Connors and Genieve Newcombe. This service, operated since 1981, sees steady use by producers with up to 30 calls a day during the height of the local produce season.

As always, we pay particular attention to maintaining regular contacts with growers, shippers, packers, distributors, wholesalers and retailers as our first line of information on local and regional market action. These contacts not only provide us with valuable data for the Market Line and Supply Forecast but enable us to respond quickly to the large number of direct telephone inquiries for detailed analysis of current markets for our various crops.

Organizations

Much of our market development work in the province's horticulture industry continues to be directed through the various producer and trade associations. We work with local producer associations, boards and marketing firms, the fruit and vegetable processing industry, the produce wholesale/retail trade and national and international organizations representing these industries. In addition we regularly become involved in specific ad hoc "organizational" activities relating to the marketing activities of individual clients.

Our involvement in market development for wild blueberries increased sharply in 1988 through the Wild Blueberry Association of North America (WBANA). As a member of the Canadian Domestic Promotion Committee we took responsibility for planning and staffing WBANA's domestic trade show exhibits, including Hostex '88 (April), Bakery Showcase '88 (October), Food & Beverage Show (February '89)

and ApEx '89 (March). We assumed the responsibilities of editor of WBANA's new quarterly newsletter in 1988 and, in conjunction with Orville Pulsifer & Associates, Truro, and various contributors, co-ordinated the publication of three editions. We served as an alternate member of the WBANA Overseas Promotion Committee. We attended the 1988 annual general meeting in Charlottetown in April, the summer directors/committee meetings in St. Andrews in July, and the fall meetings in Bar Harbour in September. With the evolution of an active committee structure on both sides of the border, WBANA continues to develop as an aggressive, fast-moving organization involved in many aspects of the wild blueberry industry.

Achieving a similar level of marketing success with the province's tree fruit industry has proved to be a more elusive goal. The Nova Scotia Fruit Growers Association provides strong leadership to the industry on many fronts but recent attempts at organized marketing have failed, as a grower plebiscite in the fall of 1988 did not achieve the necessary two thirds majority to establish a commodity board a second vote in May of 1989 also did not succeed. A dozen or more packers remain intensely price competitive in attempting to maintain market share with the four major retail accounts in the region. Good individual efforts have stood out as growers and packers improve storage and grading facilities under government programs and provide improved quality and service as exemplified by the Scotian Gold/Gravenstein program in Western Canada. The NSFGA promotion program with in-store demonstrations in Nova Scotia and Newfoundland was popular and boosted sales but has been sharply curtailed for the 1989/90 season due to budget restrictions. The export market in the U.K. continues to coast along with little sales support from the industry. The single greatest impediment to development and greater profitability in the tree fruit industry continues to be the lack of structural co-operation and singularity of purpose at the packer/shipper level.

The activities of the Vegetable and Potato Producers Association have typically stretched the group's limited financial resources to an exceptional degree in recent years. The VPPA is now a voting member of the Canadian Horticultural Council, representing the province's vegetable industry on the national scene and is active in areas as diverse as bulk purchasing and support of horticultural research. Our liaison with the vegetable industry through the VPPA is maintained through attendance in an advisory capacity at directors' and committee meetings and participation in the annual general meeting program.

Similarly, the Strawberry Growers Association remains active in many areas despite limited means. A successful in-season promotion campaign based on a number of in-store demonstrations was co-ordinated by Mrs. Bela Casson. Long-time secretary Donna Langille assumed new responsibilities in the Federation of Agriculture and was replaced by Joe McDonald.

The Greenhouse Growers Association with the mandate of a positive grower plebiscite moved to establish a provincial greenhouse vegetable marketing board in 1988, largely as a means of closing ranks in the face of anticipated intense competition from Newfoundland Enviroponics of St. Johns. Newfoundland grown seedless cucumbers were featured by Nova Scotia retailers in the spring of 1988 amid considerable publicity in the news media. As of spring 1989 the Nova Scotia marketing board has yet to implement an organizational marketing/selling plan to rationalize the sales of local greenhouse vegetables.

We once again attended the annual meeting of the Blueberry Producers Association in November. BPANS is a strong supporter of WBANA activities around the world and is increasingly active in market development in the local market. Interest in further development of a viable, high-quality fresh fruit sector remains high among several active BPANS members. Discussions are on-going with WBANA on equitable financial support for the larger organization's activities, particularly vis-a-vis the strong financial support extended by the Maine Blueberry Commission.

The Farm Organizations Joint Services Society, under secretary-manager Sonya MacKillop continues to offer management services to its six member groups on a steady, professional level from its offices in Blair House, Kentville Research Station. We continue to serve as an ex-officio member of the board of directors, which meets about twice yearly to review and oversee the operation of the office.

Liaison with the wholesale/retail trade is a crucial part of our market development work with the province's horticulture industry. At the national level, we attended the 1988 annual convention and trade show of the Canadian Fruit Wholesalers Association in Vancouver in January, which included an informative tour of key operations in the B.C. horticultural marketing sector. At the CFWA 1989 meetings in Toronto we co-ordinated a Nova Scotia produce industry exhibit under this Department's sponsorship. Produce was supplied by a number of Nova Scotia growers and packers and the popularity of our booth and the contacts made indicate this is a very effective means of projecting our horticulture industry into the national marketplace.

At the regional level, the Atlantic Fresh Produce Association held several meetings in 1988 and early 1989 aimed at broadening the organization to include more grower/shipper and more retail participation, thereby making it more representative of the region's entire produce industry. We participated in these discussions in an advisory capacity and assisted in the revision of the association's constitution and by-laws.

Efforts by the country's potato industry to establish a National Potato Agency with supply ultimate management powers were derailed once again in the spring of 1988 as lawyers representing the major potato processors successfully obtained an injunction halting the process. A federal court ruled that the National Farm Products Marketing Council had exceeded its authority in recommending the formation of such an agency. The proponent Potato Agency Task Force, under the auspices of Canadian Horticultural Council, has re-grouped and continues to work toward a plan for presentation to the country's growers once again, perhaps in the fall of 1989.

As we have done from time to time in previous years, we served on two occasions as secretary of the chicken price negotiating committee under chairman Stuart Allaby of the Natural Products Council.

Activities relating to the start-up of the Canada-Nova Scotia Agri-Food Development Agreement II came to the forefront in August with several large projects seeing a quick start under the Market Development Program. A major portion of staff time was diverted to serving as project leader and advisor on a substantial list of projects, including the following:

Riverbrook Produce - Product Development - new packaging design
and testing

Kings Produce - Product Development - corporate identity
program

Springvale Farm - Special Studies - Maritime nursery market
potential

Appleberry Farms - Product Development - bulk handling, pumpkins

" " - Physical Infrastructure - apple cold storage

Micro-Elite Laboratories - Special Studies - market research

Kings Produce - Product Development - fresh vegetable
processing

Webster Farms - Physical Infrastructure - rhubarb processing

L.W. Spurr & Sons - Physical Infrastructure - potato grading and
processing

Mawson Baltzer - Physical Infrastructure - apple grading and
packing

In addition, a number of project proposals are in various stages of preparation as of spring 1989 including several direct marketing facilities, both renovation/expansion and new undertakings.

The successful staging of the Food Marketing Challenges '88 conference in Halifax in March was the result of many days of preparation over a period of some eleven months by many Department staff and industry people, under the co-ordination of Gordon Kinsman. Attendance nearly equaled the 1986 conference with representatives from a wide cross-section of the region's food industry. Participants' evaluation supported continued organization of this sort of seminar/conference on a regular basis.

COMMODITIES

All of the factors of horticultural production were in harmony in 1988 as the province experienced one of its best growing seasons in recent years. The combination of adequate, timely rainfall, normal heat units and few abnormal pest and disease problems led to above average yields of most fruit and vegetable crops.

Tree Fruit

Nova Scotia harvested its largest apple crop since the 1940's in 1988 with production estimated at over 4 million bushels. Cold storages and CA rooms were filled to capacity and the quality of fresh fruit remained generally good throughout the marketing season. The frantic harvest season was highlighted by the dramatic movement of over 10 million lbs of peeler and juice apples to out-of-province markets. A crop shortfall in New York State and Ontario created a timely demand in 1988 for processing fruit which may lead to on-going sales in some quantity in future years. This major export effort was largely co-ordinated by Scotian Gold Co-operative, which quickly developed handling procedures for bulk loading of over 300 trucklots during the harvesting season.

The CanVin Products Div. of Campbells Soup plant in Wolfville was taken over by J.B. Foods Ltd. of Oakville, Ont. in 1988 and immediately set a course of aggressive marketing of juice products and active procurement of juice apples. Estimates indicate the firm nearly tripled the plants normal annual intake of about 12 million lbs in 1988. In addition, some 2 million lbs of peeler apples were moved to the company's Ontario facility.

Vegetables

The province's vegetable industry continues to grow and diversify with a farm gate value of crops over \$15 million in 1988. Processing crops, the backbone of the industry, account for more than a third of sales with chipping potatoes, peas, beans and carrots being the major processing commodities.

The fresh vegetable sector continues to organize toward capturing a greater share of the region's wholesale market. The efforts of organizations such as Kings Produce, Nova-Agri, and individual farms such as Riverbrook and Meiers have spearheaded this initiative with the production of new crops over longer seasons and considerable investment in marketing facilities. Proper post-harvest handling procedures and equipment remain a major constraint however and work in this area will form a major program area for us in the coming years.

Berry Crops

Nova Scotia's wild blueberry production was a record 22 million lbs in 1988 with the total North American production estimated at 104 million lbs. Growers found good demand from processing buyers due to a shortfall in cultivated blueberry production in the United States and increased end-user demand for wild. European markets continue to absorb a major portion of the Canadian crop of wild blueberries although recent currency fluctuations have placed processors in a cost/price squeeze. Japanese demand remains steady at about 3 million lbs annually.

Strawberry production was 4.5 million quarts in 1988 with the majority sold in the wholesale market in the Maritimes. Nearly 500 million quarts were purchased by local processors but these firms continue to experience intense competition from low-priced imports. Pick-your-own seems to have stabilized at about 30% of the crop. One grower exported a small amount of fresh fruit to the New England market while air freight and truck sales to Newfoundland saw steady, moderate growth, and considerable potential. One grower had a small commercial harvest of day neutral strawberries in September with modest results. We believe that a major, untapped potential exists for extended season marketing of local strawberries and that the production technology exists to make this happen.

Highbush blueberries are gradually returning to normal production levels from the 1986/87 winter injury problem. One grower continues to successfully export high quality fruit to the Boston market while the remaining smaller growers cater mostly to the local pick-your-own trade and a minor portion of the wholesale market. Raspberry production continues to see modest growth, the vast majority of which is pick-your-own. Only a tiny fraction of the province's raspberry production sees the retail trade, fragile varieties and inadequate post-harvest handling being the major constraints.

Greenhouse and Nursery

As discussed earlier, the greenhouse vegetable industry is deeply concerned about sharply increased offerings of cucumbers in the relatively small Atlantic Canada market. Considerable effort has been placed on damage control by local growers to try and minimize the effects of the Newfoundland Environmental project. It should be noted that the industry suffered additional injury due to lower sales of Ontario cucumbers into the U.S. market due to a Termik (aldicarb) scare originating in California.

The province's two major pot plant/cut flower producers are finding steady markets in the Atlantic region and to some extent Quebec and New England and form the largest portion of the greenhouse industry.

Bedding plant sales are seeing steady growth in tandem with the general public's increased interest in landscape gardening, which has also encouraged expansion by retail garden centers and wholesale nurseries such as the new Springvale Farms operation near Berwick.

Submitted by:
Peter Rideout, P.Ag.
Marketing Specialist, Kentville, N.S.

APPENDIX A

1988 Nova Scotia Crop Estimate

	1987	1988
Apples	2,800,000 bu	4,200,000
Gravenstein	190,000	350,000
McIntosh	970,000	500,000
Cortland	340,000	1,500,000
Red Delicious	290,000	350,000
Spy	230,000	400,000
Others	780,000	1,100,000
Pears	70,000	90,000
Plums	7,000	5,000

1988 North American Apple Crop Estimates

	1987 Bushels	1988 Bushels	Percent
Canada			
Nova Scotia	2,800,000	4,200,000	+50
Ontario	8,000,000	7,810,000	-4
Quebec	4,000,000	5,000,000	+25
New Brunswick	361,000	378,000	+5
British Columbia	9,769,000	9,034,000	-8
Total	25,085,000	26,422,000	+5
United States	251,014,000	193,669,000	-23
Eastern	70,167,000	68,345,000	-3
Central	37,167,000	26,525,000	-30
Western	143,205,000	98,799,000	-31

Source:

Craig, W.E.
Annual Report, 1988
Horticulture & Biology Services, N.S.D.A. & M.

APPENDIX B
MARKET SUMMARY - NOVA SCOTIA STRAWBERRY - 1988

1988 Daily Total Receipts of New Brunswick Strawberries
On Two N.B. Markets
(Quarts)

<u>DATE</u>	<u>MONCTON</u>		<u>SAINT JOHN</u>	
	<u>QTY.(Qts.)</u>	<u>W/S PRICES</u>	<u>QTY.(Qts.)</u>	<u>W/S PRICES</u>
June 23	-	-	1,000	1.90
24	-	-	500	1.90
27	1,240	1.85	1,500	1.90
28	1,032	1.94	16,000	1.60-1.90
29	-	-	5,688	1.60-1.66
30	5,088	1.83	4,760	1.60-1.66
July 1	360	1.74	-	-
2	2,208	1.74	-	-
3	768	1.55	-	-
4	-	-	2,556	1.50-1.55
5	2,800	1.60	5,840	1.35-1.40
6	2,724	1.50	-	-
7	3,132	1.40	-	-
8	3,312	1.37	-	-
11	1,800	1.35-1.45	14,520	1.20-1.35
12	600	1.16	-	-
13	3,120	1.16	10,080	1.15-1.32
14	900	1.09	13,360	.90-1.20
15	4,200	1.01	8,400	.90-1.00
18	3,600	.89-1.00	5,200	.90-1.00
20	2,520	.90-1.00	2,000	1.25-1.59
21	2,700	1.00-1.05	2,000	1.29-1.59
22	4,188	.90-1.00	-	-
27	2,450	1.10	-	-
TOTAL N.B.	48,742		93,404	
UNLOADS				
TOTAL 1987	118,202		72,600	
UNLOADS				
1988 CHANGE	-69,460 (-58.8%)		+20,804 (+22.3%)	
1988 Moncton Average W/S Price		\$1.36/qt.		
1988 St. John Average W/S Price		\$1.46/qt.		
Weighted Average New Brunswick W/S Price		\$1.34/qt.		

SOURCE: N.S.D.A.M. AND AGRICULTURE CANADA DATA

Compiled by:
Marketing and Economics Branch
Nova Scotia Dept. of Agriculture & Marketing
Kentville, Nova Scotia

1988 Unloads, Nova Scotia Strawberries, Halifax, Sydney
(Quarts)

DATE	HALIFAX		SYDNEY	
	QTY.(Qts.)	W/S PRICES	QTY.(Qts.)	W/S PRICES
June 20	320	-	-	1.90
21	3,708	2.05	-	1.90
22	4,408	2.05	1,576	1.90
23	5,396	2.05	3,840	1.60-1.90
24	2,200	2.05	1,200	1.60-1.66
27	9,100	2.05	3,300	1.60-1.66
28	7,626	1.83-1.90	2,700	
29	12,668	1.83-1.90	8,000	
30	16,184	1.85-1.95	4,800	
July 4	20,904	1.39	12,570	-
5	19,592	1.39-1.65	6,220	-
6	29,134	1.39-1.40	7,440	-
7	36,328	1.39	600	1.50-1.55
8	23,616	1.39-1.65	13,440	1.35-1.40
11	16,500	1.40-1.65	12,420	-
12	12,480	1.35-1.65	1,800	-
13	8,944	1.45	10,560	-
14	7,960	1.33-1.59	4,200	1.20-1.35
15	24,340	1.33-1.59	600	-
18	16,136	1.29	3,600	1.15-1.32
19	7,632	1.39-1.60	-	.90-1.20
20	9,864	1.10-1.17	720	.90-1.00
21	1,680	1.10-1.17	1,680	.90-1.00
22	7,488	1.05-1.20	600	1.25-1.59
25	208	-	2,080	1.29-1.59
26	1,200	1.30	-	-
29	1,524	1.47	1,968	-
-----			-----	
TOTAL N.S.	307,140		105,914	
UNLOADS				
TOTAL 1987	277,751		120,500	
UNLOADS				
1988 CHANGE	+29,389 (+9.6%)		-14,586 (-12.1%)	
1988 Halifax Average W/S Price		\$1.58/qt.		
1988 Sydney Average W/S Price		\$1.64/qt.		
Weighted Average Nova Scotia W/S Price		\$1.54/qt.		

SOURCE:
N.S.D.A.M. AND AGRICULTURE CANADA DATA

1988 Daily Unloads, Nova Scotia Strawberries,
Saint John, Moncton,
(Quarts)

<u>DATE</u>	<u>MONCTON</u>		<u>SAINT JOHN</u>	
	<u>QTY.(Qts.)</u>	<u>W/S PRICES</u>	<u>QTY.(Qts.)</u>	<u>W/S PRICES</u>
June 24	5,200	1.21	1,600	2.10
27	4,400	1.85	2,500	1.90
28	-	-	6,000	2.00
30	984	1.83	-	-
July 4	-	-	1,000	-
5	1,920	1.60	860	1.58
6	2,844	1.50	-	-
7	1,320	1.40	-	-
8	1,680	1.37	-	-
11	2,304	1.35-1.45	-	-
12	3,316	1.16	-	-
13	5,568	1.16	-	-
14	6,480	1.09	-	-
15	5,220	1.01	-	-
18	11,856	.89-1.00	-	-
20	6,960	.90-1.00	1,500	1.25-1.59
21	4,980	1.00-1.05	-	-
22	2,340	.90-1.00	-	-
25	2,545	.95-1.00	-	-
27	2,290	1.10	-	-
28	480	1.10	-	-
29	2,460	1.00	-	-
	-----		-----	
TOTAL N.S. UNLOADS	75,147		13,460	
 TOTAL 1987 UNLOADS	 79,708		 5,780	
 1988 CHANGE	 -4,561 (-5.7%)		 +7,680 (+57.1%)	
1988 Moncton Average W/S Price		\$1.23/qt.		
1988 St. John Average W/S Price		\$1.80/qt.		
Weighted Average New Brunswick W/S Price		\$1.26/qt.		

SOURCE: N.S.D.A.M. AND AGRICULTURE CANADA DATA

Compiled by:
Marketing & Economics Branch
Nova Scotia Dept. of Agriculture & Marketing
Kentville, Nova Scotia

Market Distribution of Nova Scotia Strawberries
(000's qts.)

<u>Year</u>	<u>N.S. Fresh Sales</u>	<u>Other Prov's & Export Fresh</u>	<u>Export</u>	<u>Processing</u>	<u>Total</u>
1988	3,742	300.5	*	457.8	4,500.
1987	2,962.	261.	-	277.2	3,500.
1986	2,843.	378.	-	297.	3,500.
1985	4,435.8	271.2	42.	251.	5,000.
1984	4,154.4	342.	-	500.	5,000.
1983	3,687.	180.	-	433.	4,300.

* confidential, included in totals

Percent Distribution of Strawberry Marketing, Nova Scotia

<u>Year</u>	<u>PYO</u>	<u>Wholesale</u>	<u>Other Prov's. & Export, Fresh</u>	<u>Processing</u>
1988	30	53.1	6.7	10.2
1987	35	49.6	7.5	7.9
1986	30	50.7	10.8	8.5
1985	35	53.7	6.3	5.0
1984	40	43.1	6.9	10.
1983	55	30.8	4.2	10.

1988 N.S. Average Grower Price Calculation

PYO	1,350,000 qts. @ \$.82	\$1,107,000
Wholesale	2,389,500 qts. @ \$1.14	\$2,724,030

N.S. wt. avg. W/S price	\$1.54/qt.
less comm. & freight	\$.25
less container	.15

\$1.14/qt.

Out-of-Province, Wholesale	300,500 qts. @ \$.86	\$ 258,430
Processing	457,800 qts. @ \$.625	\$ 286,125
Total Value		----- \$4,375,585

Average N.S. Grower Price	\$4,375,585 = \$.972/qt.
	----- 4,500,000 qts.

Compiled by:
Marketing & Economics Branch,
Nova Scotia Dept. of Agriculture & Marketing
Kentville, Nova Scotia



Vegetables

Fact Sheet



The Vegetable Industry in Nova Scotia

Vegetables are one of the most important cash crops for Nova Scotia farmers. They are also an important source of fresh and nutritious vegetables for Nova Scotia consumers. As well Nova Scotia-produced vegetables provide consumers with food security and good value.

Cultivated vegetable production in Nova Scotia began when Port Royal was founded by Champlain in 1605. There is no record that native Indians cultivated vegetable crops. Louis Herbert (the first vegetable producer) grew many crops such as peas, cabbage, turnips and various greens for the first time in North America. Potatoes were grown in 1623 for the first time in Canada but it was not until the mid 1800's that a large commercial potato export market developed. The potato was the most important cash crop for Nova Scotia farmers during the 1800's. Production peaked in 1880 with 25,000 hectares grown.

Early this century the potato industry dramatically declined. At the same time large scale vegetable processing as well as market gardening increased. Since 1970 roadside markets have become an important means of marketing vegetable crops. In the same time period, improved vegetable storages have increased, the volume and quality of storage vegetable crops. The first jacketed vegetable storage in Canada was built in Nova Scotia in 1968. In the last few years the wholesale markets have been developed by increasing grower specialization in one to 3 vegetable crops. Also more growers are growing "specialty crops" eg. white endive, romaine lettuce, spinach.

The first organization representing vegetable growers was the Nova Scotia Horticulture Association and International Show Society formed in 1863 (later became the Nova Scotia Fruit Growers Association). In 1939 the North Mountain Seed Growers Association was organized which later became the Kings County Potato Producers Association. In 1964 the Vegetable and Potato Producers Association of Nova Scotia was formed. This association actively promotes and encourages the advancement of commercial vegetable growing to the benefit of Nova Scotia producers and consumers. Currently the Secretary Manager of the V.P.P.A. of Nova Scotia is located at the Kentville Research Station (Blair House) Kentville, NS B4N 1J5.

PRODUCTION AND VALUE 1988

4974 hectares of vegetable crops are grown by over 350 vegetable producers generating an estimated 15.2 million dollars at the farmgate from 80,929,000 kg of marketable vegetable crops. (This does not include greenhouse vegetable crops).

75 percent of the vegetable crops area is grown in Kings County; 20% is grown in the counties of Cumberland, Annapolis, Colchester, Cape Breton and Pictou. 5% is grown in the Counties of Hants, Lunenburg, Halifax, Yarmouth and Digby (these counties are listed in declining order of vegetable area).

85% of the potato crop is grown in Kings County.

VEGETABLE CROPS (Fresh & Processing — 1988)

CROP	HECTARES	ACRES	WEIGHT (in lb) OF MARKETABLE PRODUCE	DOLLAR VALUE AT FARMGATE
Beans (snap & baking)	716	1770	8,556,000	809,800
Beets	81	200	2,000,000	200,000
Broccoli	57	140	700,000	420,000
Brussels Sprouts	45	110	737,000	221,100
Cabbage	221	545	11,990,000	1,438,800
Carrots	615	1520	30,400,000	2,128,000
Cauliflower	57	140	1,120,000	448,000
Cucumbers	63	155	1,550,000	279,000
Lettuce	61	150	900,000	270,000
Parsnips	20	50	500,000	125,000
Peas (Green)	607	1500	4,500,000	675,000
Potatoes	1660	4100	94,300,000	5,600,000
Pumpkins & Squash	162	400	4,800,000	384,000
Rutabagas	182	450	9,000,000	900,000
Sweet Corn	308	760	2,660,000	380,000
Tomatoes	38	95	1,330,000	532,000
*Misc	81	200	3,000,000	450,000
TOTAL	4974 ha	12,285 ac	178,043,000 lbs (80,929,000 kg)	15,260,700

*Onions, herbs, asparagus, melons, rhubarb, spinach, white endive, peppers, chinese vegetables, radish, leeks, swiss chard, kohlrabi, fiddleheads, broadbeans

Over 50 different types of vegetable crops can be grown in Nova Scotia. Well drained soil of the highest quality is needed for commercial vegetable production, (often irrigation is required). As well various microclimates are available to produce the range of vegetable crops desired by Nova Scotia consumers and world markets.

Growing crops is a complex business involving planning, financing and planting of the crop, mechanization, growing the crops, pest control, harvesting, cooling, packing, storage, marketing and accounting.

Fresh vegetable crop volumes are the highest between June 15 and October 31. Many crops may be stored for six months or more such as potatoes, cabbage, rutabagas, carrots, squash, beets and parsnips. Rutabagas are the only crop currently available on a year round basis.

MARKETS

The Nova Scotia per capita consumption of vegetable crops is approximately 130 kg per year. With a population of over 800,000 people that means Nova Scotians consume 104,000,000 kg of vegetable crops. Nova Scotia produced 80,929,000 kg of vegetable crops in 1988 but more than 35,000,000 kg is sold outside the province. Nova Scotians therefore obtain approximately 40% of their vegetable requirements from Nova Scotia producers.

Processing vegetable crops is the most important sector of the vegetable market. They account for 6 million dollars of 39% of the 15.2 million dollars or gross vegetable sales (at the farmgate). Processing potatoes is the most important crop, valued at 3.5 million dollars. Processing peas, beans, carrots,

and B. Sprouts accounts for 2.5 million dollars of farm sales. Small areas of rhubarb, beets and green tomatoes are also processed.

The major vegetable processors in the province and their product lines:

E.B. Allen Foods — Middleton (coleslaw and prepared salads)

Cobi Foods — Port Williams (frozen peas and beans, canned peas and beans, frozen Brussels sprouts, canned and frozen carrots, pickled beets and green tomato chow)

Hostess Foods — New Minas (potato chips)

Oxford Frozen Foods — Oxford (frozen carrots, onion rings)

A number of independent sauerkraut plants (mainly in Lunenburg County)

Webster Farms — Cambridge (rhubarb)

Roadside marketing, deliveries direct to retail stores and farmers markets is another large sector of the market at 4.7 million dollars or 31% of the total industry. One crop included here is cabbage for sauerkraut and cole slaw, and then added to this, is the whole range of vegetable crops grown in the province.

The fresh wholesale vegetable market in N.S. represents 20% of the vegetable industry (3.0 million dollars). Out of the province fresh market vegetable sales are estimated to be 10% of the vegetable industry. (1.5 million dollars) The main crops here are potatoes, carrots, cabbage, parsnips, rutabagas, cauliflower, broccoli, lettuce, tomatoes, cucumbers, squash and pumpkins, sweet corn, and beans.

Processing and wholesale markets generally offer the greatest potentials for increased vegetable production, though improved storage and extended season production for fresh market vegetable crops are also important.

ECONOMIC & EMPLOYMENT IMPACT

Vegetables are worth 15.2 million dollars to growers at the farmgate. The economic benefit to Nova Scotia is much greater. An income multiplier of 2 is used to estimate the total income generated from farmgate receipts. (This means for every one dollar of farm sales at least \$2 in income for Nova Scotians is generated). On this basis, the vegetable industry is worth 30.4 million dollars.

Vegetables are labor intensive crops in the many phases of production, processing, packaging and marketing. Approx-

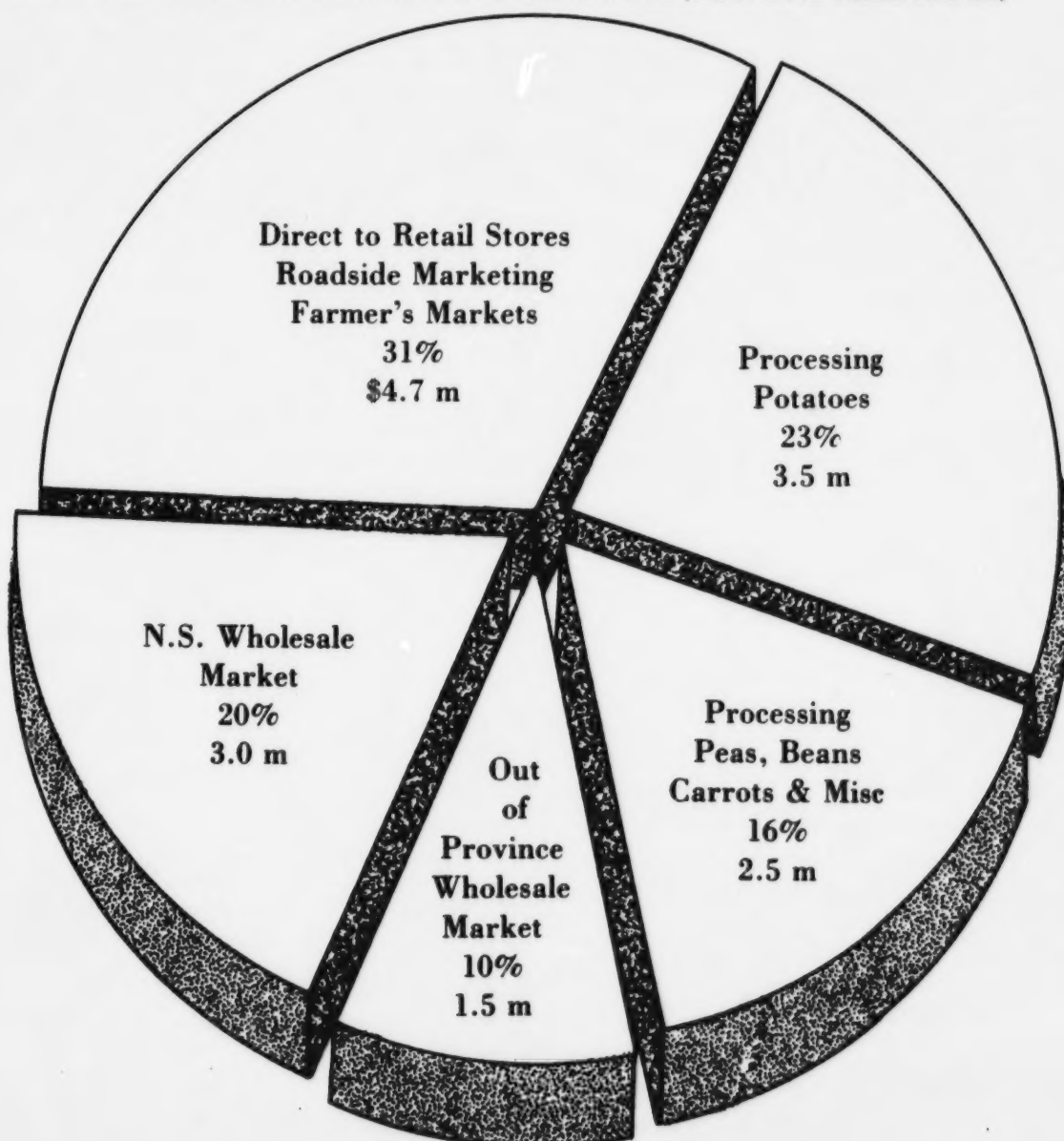
mately 2000 people depend on vegetable crops for a significant part of their income. (growers, fieldworkers, packing plant workers and processing plant workers)

NUTRITIONAL IMPORTANCE

Not only are vegetable crops good to eat, but, are good for you. Scientific studies indicate the need for more vegetables in the diet to help suppress heart disease and cancer. Vegetables supply vitamins, minerals, carbohydrates and dietary fiber. Vegetables along with fruits make up one of the four key food groupings in The Canada Food Guide.

Prepared by: Charles N. Thompson, P. Ag.
Vegetable Specialist
NS Dept. of Agric & Marketing
Horticulture & Biology Branch
KENTVILLE, NS

NOVA SCOTIA VEGETABLE MARKETS BY DOLLAR VALUE (FARM GATE SALES 15.2 md)



FOODSERVICE

I INTRODUCTION

The report to follow outlines the major initiatives and program activities in the area of foodservice marketing spanning the time frame January 1, 1988 to March 31, 1989.

The primary objective of programming is to increase the awareness and consumption of Nova Scotia food products within the foodservice sector. General responsibilities include:

1. Monitoring and assessment of the Nova Scotia foodservice market through:
 - consumption trends and sales patterns.
 - evaluation of purchasing behaviours.
 - awareness and consumption of Nova Scotia agri-food products.
 - documentation of market problems and constraints with respect to foodservice.
2. Increasing awareness and enhancing the image of Nova Scotia agri-food products within the Nova Scotia foodservice market.
3. Promotion of Nova Scotia agri-food products with significant market potential in foodservice.
4. Development and marketing of specific Nova Scotia agri-food products (branded/generic) with market replacement and expansion potential within the foodservice industry.

Program activities most closely aligned with the foregoing responsibilities are:

- (a) Educating foodservice operators, processors, distributors and producers (commodity groups/association marketing boards);
- (b) Marketing agri-food products through programs of advertising, promotion, public relations and market development within the foodservice sector;
- (c) Assisting Nova Scotia agri-food producers/processors by providing marketing services with respect to foodservice.

II REPORT OF PROGRAM ACTIVITIES

A. Liaison

1. Contacts

Initiating and maintaining contact with individuals and groups in the agriculture, food and foodservice industries of this province is key to program development efforts targetted to the foodservice sector.

In order to gain knowledge and technical expertise relating to the products and capabilities of Nova Scotia's food and agricultural industry, the following contacts were maintained over the past year: producer associations, organizations and boards; meat and poultry processors/wholesalers; fruit and vegetable processors/wholesalers; dairies; other producers and packers of Nova Scotia food commodities.

On-going contact with foodservice establishments in the province is important, so that purchasing practices and policies, food product specifications, as well as preparation and packaging requirements can continue to be monitored. A working knowledge of the foodservice market was obtained through meeting and consulting with representatives of the foodservice industry as well as government departments, agencies, organizations and associations affiliated with this industry.

Among those contacted in 1988-1989 were: Nova Scotia Departments of Health and Fitness, Tourism and Culture and Fisheries; Nova Scotia Restaurant and Foodservices Association; Nova Scotia Chefs Association; Canadian Food Service Executives Association (Halifax/Dartmouth Branch) (Northumberland Branch); Nova Scotia Dietetic Association; Nova Scotia Purchasing Agency; Tourism Industry Association of Nova Scotia; Tourism and Hospitality Institute of Nova Scotia; individual foodservice managers of restaurants, hospitals, homes for special care and other institutional foodservice operations.

2. Presentations

During 1988-89, a number of seminars, workshops and meetings were attended where presentations were given. Included are:

- Canadian Foodservice Executives Association (CFSEA), "Consumer Trends and the Challenges Facing Nova Scotia's Agri-Food Industry". (Jan. '88)
- Mt. St. Vincent University, Dept. of Home Economics, "Program Planning and Evaluation - A 'Real World' Approach". (Feb. '88)
- Mt. St. Vincent University, Dept. of Home Economics, "Program Development". (Feb. '89)
- Mt. St. Vincent University, Dept. of Tourism and Hospitality Management, "Nova Scotia's Agri-Food Industry - An Overview". (Jan. '89)
- Nova Scotia Beekeepers Association Annual meeting, "Marketing Opportunities and Challenges", chairman of a panel discussion. (Feb. '88)
- Strawberry Producers Association of Nova Scotia, Board of Directors, regarding foodservice potential (June '88) and a review of foodservice promotion '88 (Jan. '89)
- Sheep Producers Association of Nova Scotia, Presentation of the findings and recommendations resulting from the "Foodservice Market Report on Nova Scotia Lamb", Nov. '88. (Nov. '88)
- Young Farmers Conference, "The Foodservice Market - Challenges to The Agricultural Industry". (Feb. '88)

- Blueberry Producers Association of Nova Scotia, Presentation at the BPANS Annual Meeting of the results of the fresh wild blueberry foodservice promotion, August '88, "Out of the Blue". (Nov. '88)

- NSAC, Plant Science 410, Horticulture, "Food Marketing Challenges/some real-life examples". (March '89)

3. Professional Liaison

- Chairman, Legislation Committee, Nova Scotia Dietetic Association.
- Corresponding member, Nutrition Committee, Nova Scotia Dietetic Association.
- Corresponding member, Nova Scotia Nutrition Council.
- Government representative, Board of Directors, Milk Nova Scotia.
- N.S.D.A.M. representative, Co-ordinating Committee, Nova Scotia Heart Health Program (N.S. Dept. of Health and Fitness).

B. Consultation

During 1988-1989, this office responded to numerous requests for information. Topics were wide ranging: market and commodity information; source of supply; foodservice establishment listings; foodservice and agricultural statistics; food product specifications; program planning and evaluation; survey design; technical information on food, nutrition, consumption patterns; information on funding sources. Those contacting this office included individual producers; producer associations and boards; private sector agri-food firms; marketing and public relations firms; commodity promotion specialists; N.S.D.A.M. staff; other government departments; foodservice industry representatives; wholesalers.

C. Promotion and Education

1. Foodservice Data Base and Foodservice Directory

The foodservice data base, developed in 1985, underwent a second revision in 1988. This work was undertaken by Phyllis Cipolla and Michelene Gibson in conjunction with the development of the 3rd edition of the Foodservice Directory, published and distributed in 1988.

2. Publications and Other Resources

In 1988-89, Marketing and Economics Services published a number of resources to complement promotion and market development activities with respect to foodservice. In many cases these materials were a collaborative effort (i.e. graphic design, photography, recipe development/testing). The work and input by AV Services, contract casual Home Economists and Commodity Promotion Specialists is gratefully acknowledged.

"The Nova Scotia Foodservice Directory", 3rd edition, 1988. This resource contains a comprehensive listing of over 2000 commercial and institutional foodservice establishments as well as market information and agri-food contacts.

"Taste of Nova Scotia". This booklet comprises a variety of consumer recipes highlighting the array and versatility of Nova Scotia food products.

"Food For Thought - A Buyers Guide To Nova Scotia Food Products", 2nd edition, 1989. This popular resource contains a comprehensive listing of Nova Scotia food producers and processors together with contact, source of supply and product specification information.

"Lambtastic". A foodservice recipe flyer highlighting the versatility of Nova Scotia lamb.

"Apple Drink Creations". Two one-page flyers comprising apple drink recipes.

"Nova Scotia Food Products Calendar". A desk pad calendar highlighting Nova Scotia food products by month. It is produced by the Nova Scotia Restaurant and Foodservices Association in concert with key Nova Scotia agri-food professionals and groups.

"Taste of Nova Scotia", Resource Binder. Produced specifically for the Upper Clements Theme Park to support a commitment to feature Nova Scotia food products in their menu development (eight on-site foodservice locations) and marketing plans.

The production of support material to complement 1988-89 foodservice promotion programs included tent cards (4), menu clip-ons (3), buttons (3), recipe flyers/cards (13), information flyers/newsletters (15) and order forms for materials (4).

3. Promotion Programs

(a) In the absence of the Marketing Specialist, Promotion, the following consumer initiatives were undertaken in 1988:

"Lifestyles Show" (Exhibition Park, Jan. 22-24, '88) and "Swing Into Spring" (March 25-27, '88). At these relatively new, up-beat and trendy consumer food shows, a different approach in co-ordinating commodity participation was initiated. Approximately 12 Commodity Promotion Specialists shared a double booth serving to lower food, labour and exhibit costs. Each commodity had a scheduled time slot and promoted their specific product and services along a common theme.

Atlantic Insight Heritage Recipe Contest - Recipe testing and judging for consumer submissions to the Atlantic Insight Recipe Contest (March '88)

"Sea Sell '88. Production of a multi-purpose promotional piece as the agricultural submission to a provincial marketing effort.

"Taste of Nova Scotia" (consumer)

In January '88, Marketing and Economics Services began discussion with N.S. Department of Tourism and Culture regarding the possibility of a co-operative venture involving the promotion of N.S. food products at Centres around the province. A program plan and budget were subsequently developed and presented to Tourism Area Directors and provincial food Commodity

Specialists. Although Branch budgetary constraints precluded full-scale implementation of the program, the efforts of the new Promotion Specialist led to the completion of a successful pilot project. The program represents an exciting new challenge in targetting over marketing efforts to consumers.

(b) Foodservice Promotions

Meat Month and Restaurant Month (February '88 and February '89)

"Meat Me For Lunch" was a joint industry/government initiative in co-operation with the N.S. Cattlemen's Association (Beef Information Centre), the Pork Producers Marketing Board of Nova Scotia and the Sheep Producers Association of Nova Scotia. Approximately 120 foodservice operators took part in the program by featuring red meat menu items utilizing cuts marketed by eight provincial red meat processors and distributors. The launch was attended by over 120 industry, government and media representatives. A display of new Nova Scotia red meat products was well received by operators and resulted in three five-minute clips on CBC's Radio Noon. As well, red meat (health and consumer issues) was a topic on two Radio Noon phone-in spots during the month of February.

"Out of the Blue"

Both fresh (August '88) and frozen (October '88) Nova Scotia wild blueberries were widely promoted to foodservice operators in 1988. For a first-time effort the program was well received with over 200 foodservice participants in total. With respect to fresh product, the major limitation for foodservice operators is accessing product through normal wholesale distribution channels.

"Nova Scotia's Delightful Drinkables" (July/August, 1988)

The summer months are traditionally a time when foodservice beverage sales are high. In addition, Halifax hosted 4500 delegates at the First National Alcoholics Anonymous Conference (August 18 - 21). It was decided a drink promotion during this time would meet with great success. Apple, blueberry, strawberry and milk drinks were highlighted in the program. Key Halifax/Dartmouth restaurants were targetted for the promotion with thirty-eight restaurants, the World Trade and Convention Centre and the five host hotels for the National A.A. Conference participating. The popularity of the promotion was greatly underestimated with point of sale materials completely depleted within two weeks. Copies of the "Nova Scotia Delightful Drinkables" recipe booklet were included in registration packages of A.A. Conference delegates.

"Nova Scotia Strawberry Sensations" (July 1988)

The foodservice strawberry promotion was a great success in 1988 with over 100 provincial restaurants and institutions participating. The program offered participants a listing of producers by area; waitstaff buttons; menu cards; menu clip-ons, table tents and posters.

July is Egg Month - "Veggie" Foodservice Campaign (July '88)

Marketing and Economics Services assisted the Nova Scotia Egg and Pullet Producers Marketing Board in planning a trade and media reception attended by 50 foodservice representatives. Eight chefs who participated in the program were invited to prepare a feature presentation for the buffet dinner.

"Promise of Pork" Gourmet Dinner (Sept. '88)

Approximately 175 foodservice, government and agricultural representatives attended this event organized by the Nova Scotia Pork Producers and Canada Pork. Larsen Packers donated the product for a very upscale six course dinner highlighting the versatility and profitability of pork. Approximately \$2500 was raised for the Atlantic Culinary Team's trip to Frankfurt, September '88. N.S.D.A.M. is a corporate sponsor of the team.

"Expo Pork" (March '89)

Marketing and Economics Services assisted Maritime Pork Producers in organizing this event in conjunction with APEX '89 and the President's dinner. The event was a mini-trade fair highlighting new Canadian pork products targetted to foodservice. There were many exciting, innovations from Maritime processors including: Larsen's mini crown roasts (for two), crown roasts, pork cutlets, nuggets and schnitzel; Bellisle Farms porky pines; Eastern Meat Purveyors Cajun pork burgers.

4. APEX (March 13-15, 1989)

As in previous years, Marketing & Economics Services co-ordinated the commodities' representation at the largest foodservice trade show in Atlantic Canada. This year, twelve commodities participated serving to underscore their increased interest in the foodservice market.

D. Market Development

1. Maple Weekend

A co-operative pilot program involving several host hotels and maple producers was developed for implementation during the 1990 season, pending budget and MPANS Board of Directors approval. The project involves the organization of a weekend of activities centered around the maple industry including maple menu selections, the opportunity to purchase product, an organized bus tour to the maple woods and a maple supper.

2. "Taste of Nova Scotia"

In May of 1987, the Department of Agriculture and Marketing and the Department of Fisheries initiated discussions with the Department of Tourism and Culture regarding a co-ordinated food program targetted to the foodservice industry. In late May, 1988, the Government of Nova Scotia approved the establishment of the "Taste of Nova Scotia" program. The program proposes to position the province as a food destination by targetting the 1.5 million people who travel the province seeking a "taste of Nova Scotia" - that is, our indigenous food products, wholesomely prepared and imaginatively presented.

Summer, 1989, is the charter membership year and the focus will be to feature and promote member foodservice establishments which must meet specific service, hospitality and menu guidelines. A Government/Industry Advisory Board and a Program Manager are responsible for ensuring program credibility and effectiveness through inspections, local food product quality and quantity control and education program components.

With respect to the provincial agricultural industry, the potential for the program is significant as it will provide marketing opportunities for producers and processors of local, quality products and increase both awareness and consumption by providing producers with a showcase for these products.

3. "Foodservice Market Report on Nova Scotia Lamb", Nov.'88

In August, 1988, a survey was conducted to describe the purchase and usage patterns of fresh Nova Scotia lamb by provincial foodservice operators. The results, available in a report upon request, have provided the Branch with useful base-line information for on-going work in the area of product development, marketing efforts and the production of foodservice resource material.

4. Foodservice Lamb

Marketing and Economics Services assisted SPANS in the co-ordination of a booth at APEX '89, the production of resource materials and the development of a foodservice marketing plan.

5. White Endive

Activities with the Punt's are on-going and include the co-ordination of a booth at APEX '89, local foodservice and wholesale initiatives and the development of promotional material.

6. Milk Nova Scotia

Assistance was given in developing a research proposal to investigate the market potential for milk and milk products in the lucrative convention/catering market.

7. ACA Co-operative Association Limited (July '88)

Marketing and Economics Services organized a successful sales seminar and product test for ACA's new pork products (nuggets, patties, schnitzel, cutlet). Approximately 20 key institutional food buyers attended with resultant sales increases.

8. Consumer Testing/Sensory Evaluation

A consultant has been contracted to assist Marketing and Economics Services in the development of a program in this area. Although the Branch has conducted consumer testing on a limited scale, there is a need to build on this program with resources, training and computer capability.

9. AFDA

Member of the AFDA Market Development Implementation Committee and project leader for seven applicants in 1988.

10. Tourism and Hospitality Institute of Nova Scotia (THINS)

The THINS "gift-pack" project in concert with Kingswood Condiments and Applebee Acres Honey could best be termed a very limited success. The silver lining is that both producers received tremendous exposure in all areas of the province and the project served to demonstrate the potential of this gift pack market.

E. Continuing Education

This office attended the following conferences and trade shows during 1988-1989. These opportunities are much valued for information exchange, professional updating and a means of looking at 'old' ideas in a new light.

HOSTEX, April '88, Toronto.

Canadian Food & Beverage Show, February '88 and '89, Toronto.

APEX, March '88 and '89, Moncton and Halifax.

World Food Day '88, Truro (Session Chairman/M & E assistance with clerical and secretarial support).

Canadian Food Service Executives Association National Conference, June '88, Dartmouth (Promotion Chairman).

Food Marketing Challenges '88, Halifax (member of Organization Committee/Co-ordination of food & hospitality).

Staff Conference '88 (co-ordination of Marketing and Economics Services display and presentation).

Canadian Dietetic Association National Conference, June '88, Halifax (Session Chairman).

Yankee Cook-Off, October '88, Boston (Program development for "Taste of Nova Scotia" program).

F. Commodity Marketing Assistance

This office co-ordinated the program of grants given to Nova Scotia agricultural commodity associations, boards and related groups during 1988-1989. This responsibility will be transferred to the new Promotion Specialist for the 1989-90 budget year.

Although by no means inclusive, a summary of groups and the highlights of activities where Marketing and Economics Services assisted are summarized below.

Farmers' Markets Association of Nova Scotia

- salary for co-ordinator
- production and printing of a cookbook
- program of awards to markets

Eleven Farmers' Markets

- advertising
- general promotion

Blueberry Producers Association of Nova Scotia

- printing of promotional material for fresh wild blueberry promotion (August) - retail and foodservice
- general promotional activities throughout the year
- "October is blueberry month" campaign

Nova Scotia Beekeepers Association

- printing of poster and pamphlet
- printing of label and logo for use on jars of local honey

Farm Fresh Marketing Association of Nova Scotia

- "Harvest Line"
- Media advertising (newsletter)

Sheep Producers Association of Nova Scotia

- market study
- meat month promotion
- salary for promotion person
- production of foodservice material
- "Taste of Nova Scotia" promotion
- APEX foodservice trade show

Pork Producers Marketing Board

- local support of Canada Pork's promotional activities
- "Promise of Pork" gourmet dinner (foodservice)
- "Expo Pork" for new Maritime pork items
- APEX foodservice trade show

WBANA

- support for Canadian wild blueberry promotional activities

Strawberry Growers Association of Nova Scotia

- printing of foodservice promotional materials
- retail promotion (in-stores, salary for co-ordinator, printing of promotional material, advertising, administration of programming)

Vegetable and Potato Producers Association of Nova Scotia

- vegetable cooking school
- retail display contest
- malls and exhibitions
- printing of promotional material

N.S. Egg & Pullet Producers Association

- media relations
- consumer relations
- foodservice "Veggie" campaign
- education
- retail in-store promotion

Nova Scotia Turkey Marketing Board

- summer promotion sweepstakes
- in-store demos
- miscellaneous promotion and advertising

Beef Information Centre/Cattlemen's Association

- local support of BIC's National promotion
- meat month promotion (foodservice)
- advertising
- salary for promotion specialist
- food extravaganza
- APEX '89 participation

Maple Producers Association of Nova Scotia

- maple festival promotion (printing/advertising)
- salary for marketing assistant (maple supper survey; foodservice program development)

Nova Scotia Chicken Marketing Board

- production of a series of promotional videos

The activities of Nova Scotia agri-food commodity groups will be highlighted in a yearbook to be published in June '88.

G. Marketing Assistance Program (MAP)

Marketing is an integral and important aspect of the agricultural industry in Nova Scotia. Marketing and Economics Services has traditionally provided leadership, expertise, manpower and funding to over twenty producer associations, marketing boards and trade and industry associations/groups. In July of 1988, with the assistance of other Marketing Specialists, this office began formulating the Marketing Assistance Program (MAP) to expand and increase the effectiveness of marketing activities jointly undertaken by Nova Scotia agri-food commodity groups and the Nova Scotia Department of Agriculture and Marketing. It is hoped that the program will aid in the development and administration of effective co-operative marketing programs for Nova Scotia's agricultural industry.

In collaboration with the Promotion Specialist, a two-day program planning workshop entitled "Planning Your Own Programs - A Workshop on Program Development" is being planned. The objective is to assist interested commodity group representatives and Marketing Specialists in their efforts to develop and implement innovative and relevant program initiatives.

H. Administration

- Workplan, reporting, budget submissions.
- Calls and correspondence related to program.
- Special reports as requested.
- Co-ordination of contract casual employees.

III CONCLUSION

This past year can best be described as one of exciting new directions and challenging program initiatives. The work and assistance of many individuals who contributed to the success of programming is greatly appreciated - most notably, Mary Paquet, Micheline Gibson, Dawn MacKay, Phyllis Cipolla, Heather MacKenzie and Bela Casson. As well, the input and support of my Director and colleagues are gratefully acknowledged.

It is hoped that through the efforts outlined in this report, a significant impact on the agricultural industry of this province has been realized.

Submitted by:

Linda MacDonald, M.Sc., P.Dt.

Marketing Specialist (Foodservice)

PROMOTION

INTRODUCTION

The position of Marketing Specialist, Promotions, became occupied by this office in April 1988. The variety of responsibilities and marketing work is highlighted in this report according to the following categories:

- I Commodity Promotion and Market Development
- II Trade Shows, Exhibitions
- III Special Conferences, Seminars, Events
- IV Market Development
- V Presentations and Public Relations

COMMODITY PROMOTION AND MARKET DEVELOPMENT

This office met three times with Nova Scotia agricultural commodity boards and associations to discuss promotional plans and upcoming consumer and trade shows. The close working relationship that exists between commodity representatives and the Marketing Branch continues to enhance the promotion and market development activities of the whole group.

Specific commodity promotional work:

Wild Blueberries - a complementary retail and foodservice promotion called "Out of the Blue" was developed in cooperation with BPANS. The retail program, designed to enhance in-store fresh blueberry merchandising, was offered to Sobeys stores in the Halifax area.

A report was given to BPANS at its annual meeting.

Apples - Sheila Ferguson and I worked together with Elaine Ells, Fruit Growers Association, in the development of new point of purchase materials (i.e. a new consumer brochure and retail apple variety poster). Apples were a part of the "Taste of Nova Scotia" promotion at the Tourist Information Centre in Amherst.

Honey - A new Nova Scotia honey poster was produced along with a new recipe brochure. Honey products were on display at Swing Into Spring, Atlantic Winter Fair and Food Fair Atlantic.

Maple - A promotion proposal was presented to the directors of Maple Producers Association of Nova Scotia and a report was given at the annual meeting.

The association has been investigating the feasibility of establishing a maple syrup cooperative in Cumberland County. This office has been acting as an advisor in the above investigation. The Marketing Branch has also conducted maple producer and consumer surveys to help aid in planning future marketing and distribution strategies.

A maple festival/producer brochure and maple placemat were developed this year. An advertising campaign was also coordinated on behalf of Maple Producers Association of Nova Scotia. The Marketing Branch sponsored a maple promotion at Ski Wentworth in March '89.

Vegetables - VPPANS worked with the Marketing Branch in presenting Nova Scotia vegetables to the travelling public at the Tourist Information Centre in Amherst. This office also helped develop a carrot display for the Atlantic Winter Fair.

Taste of Nova Scotia Program - A freelance home economist was hired to conduct Nova Scotia agri-food promotions at Nova Scotia Tourist Information Centres in Amherst and Halifax. Lamb, blueberries, vegetables, pork and apples were highlighted at various times throughout the summer and fall.

TRADE SHOWS, EXHIBITIONS

Trade Shows:

Sea Sell '88 - The Nova Scotia Tourism promotion to the New England States was a resounding success and Nova Scotia Department of Agriculture and Marketing's agricultural display enlightened many New Englanders as to the variety of agri-foods produced and offered in Nova Scotia.

Bakery Showcase '88 - Many users of wild blueberries visited the WBANA booth at the show. As well, several new inquiries were made for a source of supply.

Canadian Fruit Wholesalers Association - Peter Rideout and this office worked together in coordinating a Nova Scotia fresh produce display for the CFWA annual convention in Toronto this year.

APEX '89 - Once again, the Marketing Branch was responsible for the Atlantic Fresh For Flavor Foundation display at APEX in Halifax. Samples of vegetable chowder were given out along with foodservice recipes and a list of fresh produce suppliers/wholesalers.

Exhibitions:

Cumberland County & Annapolis County Exhibitions - The Marketing Branch coordinated displays for exhibitions in Oxford and Lawrencetown.

Food Fair Atlantic '88 - The Nova Scotia Department of Agriculture and Marketing participated in the food show in '88. A sensory taste panel and display of fresh produce and Nova Scotia honey products met with much consumer interest.

Various food companies asked for assistance in testing some of their new products. Those tested at the show included:

- Forever April Goat's Milk
- O.H. Armstrong's cooked roast beef
- Scotsburn Chocolate Milk
- Farmer's Jor
- Peninsula Farm yogurt
- Field tomatoes

Atlantic Winter Fair - For the first time, Nova Scotia agricultural commodity boards and associations were permitted to sell food samples for a token fee. The commodity groups were very pleased with this move as they found people were more interested in the products being sampled. Participants included the Strawberry and Fruit Growers, Beef Information Centre, pork, sheep and egg producers. The NSDAM display featured a consumer/marketing quiz and a horticulture and biology quiz.

Swing Into Spring '88 - This first year show was attended by over 4000 consumers in the metro area. The upscale food, wine and lifestyles show, a fund raiser for the Dalhousie Medical Research Foundation, offered a new promotional vehicle for commodity groups. NSDAM coordinated a booth at the 1989 Swing Into Spring show which involved 11 commodities.

SPECIAL CONFERENCES, SEMINARS, EVENTS

Food Safety and Handling Workshop - attended a 1 day workshop sponsored by Nova Scotia Department of Health.

Canadian Cancer Society - set up a Nova Scotia food products display for a cancer society volunteer workshop.

N.S.A.C. Open House - set up a Marketing Branch display in Cumming Hall for the College's annual open house weekend.

Women's Institute of Nova Scotia - Coordinated a Nova Scotia food product's reception for the WINS 75th Anniversary convention in Truro.

Advertising Workshop - attended a 1 day workshop sponsored by the Truro Development Corporation.

Professional Approach to Food Promotion - planned and conducted a workshop for commodity groups and industry personnel. This was a joint initiative by the Extension and Marketing Branches.

Commodity Week - coordinated a one week promotion of Nova Scotia foods at Beaver Food's foodservice outlet on campus at NSAC. Commodity groups set up displays and offered point of purchase material to students and staff. The cafeteria offered daily specials featuring Nova Scotia foods.

Nutrition Labelling Seminar - attended a seminar in Halifax conducted by Health and Welfare and Consumer and Corporate Affairs. Representatives from both Departments outlined the new labelling guidelines for food packages and point of purchase material.

How To Get The Most For Your Exhibition Dollar - attended a seminar on choosing the right show and making an exhibit a success.

Marketing Seminar - attended a seminar on the ornamental industry. An expert from the United States gave marketing tips and new merchandising ideas.

Heart Healthy Luncheon - helped organize a luncheon in Truro which launched Nutrition Month and highlighted heart disease concerns in Nova Scotia.

Atlantic Insight Recipe Contest - The Marketing Branch acted as preliminary judge in the '88 and '89 Heritage Recipe Contest. Recipes from two food categories were screened, tested and rated.

MARKET DEVELOPMENT

Bluenose II Promotion - Nova Scotia Department of Agriculture and Marketing together with the Nova Scotia Department of Fisheries invited several food companies from the Boston area aboard the Bluenose for a tour in the Harbour and a "taste of Nova Scotia". Sarsfield Pies, Farmers Shakes and Jor and a variety of seafood hors d'oeuvres were served to guests on board.

Korean Delegation to Nova Scotia - set up a WBANA exhibit in Halifax and greeted a small group of food buyers from Korea. They were introduced to the wild blueberry and received price, package and supply information.

Festival of Foods Promotional Video - a proposal was circulated last year seeking support for the production of a Nova Scotia food's video. This video will serve as a promotional tool in drawing the travelling public to the provinces many food oriented festivals.

A steering committee, consisting of representatives from fisheries, tourism and agriculture departments was struck. The collection of raw footage has begun and should be completed in the fall of '89.

Multipromotional Binder - Nova Scotia Department of Agriculture and Marketing worked with the Department of Industry, Trade and Technology in developing a departmental binder which will be used as a promotional and educational tool.

Milk Nova Scotia Research Project - worked with a committee of Milk Nova Scotia in developing a research proposal to investigate the potential for increased consumption of milk at conventions and universities. The research worker was hired under AFDA project and the findings will be submitted to Milk Nova Scotia in a final report.

PRESENTATIONS AND PUBLIC RELATIONS

"The Role of Media in Agriculture" - a presentation to the Nova Scotia Federation of Agriculture's annual meeting. The panel consisted of Deborah Hornsby, CBC Radio Producer, Frank MacDonald, CKCL, Heather Jones, Farm Focus Editor, Dr. Ellen McLean, Chairman CBC Advisory Committee on Agriculture and Food and Laurie Thompson, N.S.D.A.M.

"Promotion of Nova Scotia Food Products" - a presentation to Colchester County Farm Women's Workshop.

"Changing Consumer Trends" - a presentation to agri-food groups with a food promotion workshop sponsored by the Marketing and Extension Branches, N.S.D.A.M.

Committee Work

- (a) Publicity Committee for Field Crops EXPO '90
- (b) Publicity and Hospitality Committees - Maritime Pork Conference '89.
- (c) Nutrition and Heart Month Committees
- (d) Program Committee for N.S. Home Economics Association Annual Convention
- (e) Atlantic Fresh Produce Association retail sub committee
- (f) N.S.I.A. newsletter committee; also involved in the Agrologist-In-Training program.

Marketing Branch Radio Information Service

- "Agriculture and Marketing Update".

This office continues to act as hostess for the weekly radio program which brings agriculture and marketing items of interest to the general public's attention. Since the program's inception in October '88, the Marketing Branch has completed 70 radio interviews.

N.S.D.A.M. Placement of Ads - this office handled requests for departmental ads in numerous agricultural publications and other magazines, journals, newspapers, etc.

Submitted by:
Laurie Thompson, B.Sc., M.Sc.,
Marketing Specialist (Promotions)



AUDIO VISUAL/COMMUNICATIONS

A/V PRODUCTION - TECHNOLOGY

INTRODUCTION

Over the past 15 months the Audio Visual Production Unit received a much needed shot in the arm. We now have production equipment (video camera-recorder and a computer graphics system) that enables us to create quality presentation materials.

Being a part of the "instant information era", we must strive to keep abreast with new technology and training. The Marketing and Economics Branch realized this necessity and have taken a leadership roll in making budget monies available to purchase video production and computer graphic equipment.

Under the new agreement, priorities have been established for the production of training and technology related video clips. We all must set our sights as being leaders, not followers.

I would like to echo the phrase made famous by the television series, "The Six Million Dollar Man" - "We now have the technology"...and so we here too in A/V production now have the technology to create computer graphic slides and produce video training packages.

PHOTOGRAPHY

Copy Stand

With the installation of Cheryl's computer graphic system, the demand for lith and veri-color slides has fallen off. The ability to create vibrant colored text and graphic slides via the graphics software package certainly surpasses the older method of hand coloring lith slides.

Location Assignments

Over the past 15 months there has been a substantial increase in location and press assignments. Part of the increase has been alleviated with the addition of Federation of Agriculture's Information Officer and the media commitments for Agriculture Canada have been contracted to a private production company. With these two groups now taking care of their own press related photography assignments, I suspect there will be some drop in press related assignments.

Location photography continues to grow in leaps and bounds. Our Department is becoming more visually aware. The majority of staff who make presentations wish to dress up their talks with supporting visuals including a title slide, a few special effect slides and some split screens. These little added touches certainly enhance the professionalism of the speaker.

Slide Library

With the increase of location assignments the slide library also has a chance to grow. Slide library requests were certainly on the rise this past year. Our slide library remains in its infancy stages. It would be fantastic (but impossible) to take one year and tour the province seeking out "all" the agricultural related visual material. I certainly encourage any of the specialists, extension people and technicians who travel a lot to keep an extra roll of film in their vehicle. You can almost be sure some time down the road you are going to be asked to give a presentation referring to your projects.

To date, we manage to squeak by when we receive requests. The majority of requests come through the Halifax Office and the request is usually for "general farm type picture", which means send on everything. The requests come from education, private groups, newspapers (for food articles), Atlantic Insight, and private companies working in promotion (i.e. strawberry packaging). The slide library has been called upon several times to provide a cover shot for the Extension News which is produced quarterly.

This past year saw the completion of a maple presentation. Hence, the maple industry is well represented in the library.

There will be an excellent opportunity to add some commodity related library slides to our files this year as Laurie and myself work on a festival of foods related video. The footage will be collected throughout the province as we cover selected food festivals i.e. Maple Suppers, Strawberry Festival, etc.

Studio Food Photography

The requests for food photography has also increased but what is more significant is the type of projects we are attempting to incorporate into promotional campaigns. The requests for food photography are channelled through the Marketing Specialists, Linda or Laurie. The shot is then discussed at length with the commodity person involved. Several meat dishes, lamb, beef and pork were composed and completed for APEX. Another APEX assignment was the introduction of fresh Belgian Endive. The product was shown in both its natural environment, the hydroponic forced growth, and served as a vegetable salad. A rather complete picture to help introduce the public to a new vegetable product.

The cover shot for the new apple recipe brochure, a honey poster, booth panels and cover shot for the honey recipe brochure have all been completed. Several greenhouse stock shots have been taken to be used for new point of sale material. This project is on-going. We have also had much discussion on whether to produce a new maple poster or reprint the present poster or both.

As the requests for studio food shots increase, so should the level of expertise. Food photography is both challenging and very frustrating! This past winter I was treated to a terrific food styling and photography lighting workshop put on by the food stylists of Canadian Living Magazine. The amount of technical lighting skill and the food styling knowledge shared during the course was incredible. I certainly feel more knowledgeable and much better equipped to tackle our summer's assignments (red meat, veggie garden salads, strawberry and blueberry promotion materials).

Other studio work includes the cover shot for the Atlantic Agricultural Directory, a page in the Crop Insurance calendar and several photo journalistic shots published in agricultural related brochures i.e. Crop Expo. The cover shot for the Industry Trade and Technology - Agricultural Section, were supplied by this office.

Photography Assignments Jan. 1988- March 1989

Copy Stand	20
Location & Press Assignments	135
Slide Library Requests	36
Studio-Food Photography	30

MULTI IMAGE PRODUCTION

"It's Maple Time" - A twelve minute multi-image slide presentation was released January 1989. This presentation was produced for the Horticulture & Biology Branch. The show has been transferred to video tape and is available to the school system via the Department of Education. The tape is also on file in the AV film library and is readily available to service groups, church groups, Women's Institutes etc.

In checking with the video library, Department of Education, requests for the tape have been brisk. In many areas of the province the maple industry is studied as part of the grade 8 social studies program.

The production took an unusual length of time to complete due to the simple fact that we were at the mercy of weather conditions, which in turn effects the sap flow. We had an extra year added on to our production schedule. The final product was worth the wait. The production tells the complete story of maple syrup production, the history, the sugar bush management, the tapping and boiling down procedures and ends up with the recreational tours and maple suppers, events which are becoming extremely popular. The tape has also been made available to the producers who offers tours of the sugar bush and have facilities for a pancake house.

I have been informed the Department of Lands and Forests requested a copy to be shown in conjunction with their sugar bush management course.

Royal Bank & Marketing Opportunities

A multi-image presentation was put together for the Royal Bank Bankers Conference held last November in Halifax. The presentation followed closely the theme of "Food Marketing Challenges" and several new marketing opportunities were added. For the Royal Bank talk and for a presentation given by our Director at the Directors Annual Conference, several Free Trade computer graphics were created and are now on file.

VIDEO

Horsepower is a ten minute inter-active video and was produced for the Farm and Home Safety Committee. The major funding was provided by Agriculture Canada under the Federal Provincial agreement. The safety video highlights runovers, roll-overs, power take off entanglements, overloaded front end loaders, more than one person on a tractor and hearing loss due to engine noise.

The inter-active approach used in this video is unique. The video was designed to give the viewer time during the program to examine safety practices followed on his own operation. Each tape is sent out with a farm safety check list which is to be filled out and circulated with all the members of the farm family.

The video is geared toward the farm family. The farm safety committee felt it would be more effective to target the whole family including hired help as farm safety practices apply to everyone involved in the daily operation. The video makes effective use of two testimonials given by farmers who were disabled or almost seriously injured by one moment of carelessness.

Forty five copies of the video are in circulation throughout the province. Copies have been forwarded to Ontario and the three Atlantic provinces. As well, two farm machinery dealers have requested copies for use in their shops. Andy Vermeulen has requested a copy of "Horsepower" to be used in his farm tractor training schools.

This project did not come without many trials and tribulations. When the project began we were renting camera and recorder and of course, weather dependant. Needless to say, rental dollars were lost. A proposal to purchase broadcast quality equipment was prepared by members of the ALFI Video committee. It soon became very evident budget dollars would not be made available for such a purchase. Through the capital budget of the Marketing and Economics Branch, a broadcast quality camera and recorder were purchased. Hallelujah!!

Taste of Nova Scotia Food Festival Video

An ambitious adventure is underway to create a five to seven minute video of food festival events throughout the province. This video is being produced by the Department of Agriculture and Marketing, Tourism and Culture and Fisheries. The major budget thus far has been committed from Agriculture. The video will be shown in Tourist Information Centres through the province and on CN Marine ferries.

The major goals of the project will be to increase the consumption of locally grown products be it a strawberry festival supper or a lobster carnival supper.

At this point a steering committee has been put in place, decisions made on which festival events to cover and a rough draft script and story board have been completed. Onward and upward, at least this year half the battle is licked (we have our own equipment). Now if only we could rely on the weather-man.

Mechanical Strawberry Harvester

A proposal and budget has been written upon the request of P. Swinkles to produce a training video, demonstrating the versatility and mechanics of the strawberry harvester. The tape would benefit the engineers, horticultural personnel as well as private industry. This project awaits budget approval.

Under the ALFI Video Committee, five soil and crops related topics were submitted.

1. Stored Forage Quality
2. Cereal Management Systems
3. Grazing M.G.T. Systems
4. Forage Project Highlights
5. Soil Fertility and Testing.

There has been no further discussion regarding the production of these tapes.

There have been other requests to produce training and promotional type videos. The Wool Marketing Board are examining the possibility of producing a training and promotional tape. To date there has been nothing confirmed.

In 1990 Nova Scotia will be hosting the Canadian Council. 4H have indicated their wishes to put together a tourism type video. Unfortunately there is no budget to work on this project. It is the hope of this office that once we complete our Festival of Foods video we will have tons of our footage that could be used for other promotional projects.

Crop Expo 90

Although the summer of 1990 seems far away, the planning and publicity committees of "Crop Expo" are well in place.

Laurie Thompson and myself were placed on the Publicity Committee of Crop Expo 1990. To date there have been several steering committee meetings and a total of two newspaper articles, a radio spot and an information brochure. The brochure was printed and handed out at the Federation's Annual meeting in December.

The Publicity Committee is planning to produce video clips to be shown during the Expo days in the publicity booth. The video will show the planning stages and seed bed preparation.

CONCLUSION

As I look back over the past fifteen months, there are definitely some highlights that stand out in my mind.

The day we took delivery of the broadcast quality S-VHS camera and recorder certainly was a five star day.

Every major project brings its ups and downs but trying to work without the tools required to do your trade can be very frustrating.

A great deal of the success of the farm safety video project is a direct result of the budget dollars that were committed to purchase the video equipment....and for that I am truly grateful.

As I look ahead to the production of the Taste of Nova Scotia's "Food Festivals" video, a tad of apprehension crosses my mind but I know one hurdle I won't be faced with is the rental of production equipment.

Another highlight for me over the past year was the course I attended on food photography. What I learned in those few days was incredible and what's even more exciting, the information received has renewed my interest to try more difficult shots. Hopefully the results will be positive. To date I have several interesting ideas for strawberries regarding a placemat.

In closing, it is my observation that the staff of the Nova Scotia Department of Agriculture and Marketing are becoming visually aware and selective when making presentations. Our booth display, recipe brochures and slide presentations are all showing positive signs of improvement.

Submitted by:

Sheila Ferguson
Information Officer

GRAPHIC DESIGN - COMPUTER GRAPHICS

GRAPHICS SERVICES:

Services were conducted throughout the year, primarily for Market Development and Promotion. There were, however, a large number of "front-door" requests from other Department offices. The scope of these jobs is so widespread, it is difficult to categorize and summarize each and every request. Therefore, the following is an overview covering some of the more important or frequent projects.

	<u>Markets</u>	<u>Other Dept.</u>	<u>NSAC</u>	<u>Agri-related Groups</u>
Camera Ready Art:	30%	28%	24%	18%
Drawings/Graphs:	38%	51%	6%	5%
Signs/Posters/Tents:	13%	4%	1%	82%
Computer Graphics:	41%	44%	8%	7%
Paste-ups for slides:	25%	58%	11%	6%
PMT's:	45%	22%	6%	27%

The first two categories above make up a good portion of the "front-door" requests that are received within this office. Camera-ready artwork includes all materials that were prepared for printing such as brochures, ads, recipe cards, handouts, letterheads, logos, pamphlet covers, etc. Drawings & Graphs are materials prepared for use in publications, for slides, overheads, etc.

Approximately 200 signs, posters & tent cards were prepared during the year with the majority being tent cards for several Commodity Boards & Associations.

There has been a tremendous increase in the creation of computer graphics for slide presentations. Since the addition of computer graphic software to the office in October, 58% of the total slides created in the fifteen-month period were prepared in the last six months. Close to 900 slides were prepared throughout the year.

There was an inevitable drop in the preparation of slides using the old "paste-up" method. Only 72 paste-ups were done throughout the year for shooting. Often, these were graphics and text that would have been more difficult to create using the computer.

A total of 257 PMT's were shot throughout the year.

MISC. BROCHURES/PUBLICATIONS:

Canadian Food Service Executive Association (CFSEA):

The brochure, Reflections on the Sea, was developed for the 14th-Annual National Conference held at the Holiday Inn, Dartmouth, N.S.

The School Milk Program brochure created in 1982 was re-vamped and updated for the Cape Breton Resource Exhibition in Baddeck.

A program/menu was designed for the Canadian Colleges National Men's and Women's Basketball Championship dinner.

A general-purpose informational brochure was created for The Nova Scotia Fur Institute.

A Fall Fashion Show - program/sponsor hand-out was prepared for the Canada Fox Breeders Association - 69th Annual Meeting held in September.

COMMODITY PROMOTIONAL MATERIALS:

Nova Scotia Fruit Growers' Association:

This recipe brochure, Fresh Ideas with Nova Scotia Apples was developed for general-purpose promotional uses.

Another recipe brochure, entitled The New Taste of Turkey, was prepared for the Nova Scotia Turkey Marketing Board's promotional purposes.

Two booklets were developed featuring recipes from each of the commodity Boards and Associations. One was distributed at the Food Products Reception held in Truro for the Women's Institute's 75th Anniversary. The booklet was entitled, Entertaining with Nova Scotia's Best... Light Bites...with a Touch of Class.

The second booklet, entitled Healthy Eating...Is a Basket Full of Nova Scotia Agri-Food Products, was prepared for use at the "Swing Into Spring" show (March, 89).

Honey...Nature's Golden Goodness recipe brochure was created for the Nova Scotia Beekeepers Association. A poster was designed and prepared in conjunction with Sheila Ferguson, promoting Nova Scotia Honey.

A brochure was redesigned for the 15th Annual Maple Syrup Festival for the 1989 Maple season, listing the maple festival suppers and the participating maple producers. As well, a maple placemat was created and prepared for use at the festival suppers.

A cover/menu was designed for the "Promise of Pork" Gourmet Dinner (for the Pork Producers Association of Nova Scotia).

MISC. PROJECTS:

A "Cloverbud" logo was designed for the young 4-H'er's. Two appreciation awards were created, one for 4-H and one for Cloverbud. A "4-H Catch The Wave" logo was prepared for a desk plaque.

A logo was designed and prepared (Seams Spectacular) for the 4-H Sewing Leaders Conference.

Assistance was provided, once again, with the NSAC Athletic Centre Calendar/Blotter advertisements. The 31-ad blotter was prepared for printing in this office.

Label designs mock-ups were prepared for the Tourism & Hospitality Institute of Nova Scotia (THINS). The three labels featured Nova Scotia Agri-Food Products - Strawberry Jam, Apple Jelly and Honey.

A small amount of time was involved, working in conjunction with other staff on the Remote Bulletin Board Service. Computer work was done on the bulletin menus to "polish" up their appearance.

A certificate was designed for "Inspected Meat Plants Association of Nova Scotia" (IMPANS), as well as an advertisement.

Letterhead and Envelopes were prepared for the Dairy Cattle Sales Society (DCSS) as well as a membership certificate.

FOODSERVICE & RETAIL PROMOTIONAL MATERIALS:

A drink promotion flyer/order form was prepared for a foodservice promotion. The tent card Delightful Drinkables was designed for use in the promotion as well as a drink recipe hand-out.

A strawberry price card, flyer and buttons were designed.

Two blueberry flyer/orderforms were created for both retail and foodservice promotions. A blueberry tent card and button were designed for use in these promotions as well as a foodservice information sheet.

Once again, the Meat Month campaign involved designing new tent cards, menu clip-ons, buttons, wine labels and the promotion flyer/order form.

LOGO DESIGNS/PROJECTS:

Applebee Acres (Honey) - via Dept. staff
Nova Scotia Honey
Nova Scotia Beekeepers Association
Atlantic Poultry Research Institute
Atlantic Provinces Agricultural Services Co-ordinating Committee
Agri-Focus (re-vamped)
Sheep Producers Association of Nova Scotia (SPANS)
- logo design done elsewhere was re-vamped slightly.
Field Crops Expo '90

TRAINING:

Two seminars were attended at the "Apple Atlantic Business Forum and Product Expo", Halifax.

A two-day seminar was attended on Computer Graphics at the Technical University of Nova Scotia, Halifax.

A five-night course was taken through the Vocational Training office of the NSAC on Autocad - Computer Aided Drafting.

CONFERENCES:

Food Marketing Challenges Conference, Halifax

Staff Conference - 1988

Submitted by:

Cheryl Kienzle (Baird)
Graphic Artist

RADIO & A/V SERVICES

VIDEO DUBS (copies) AND AUDIO DUBS

There were 349 video copies reproduced. There were 146 audio cassettes reproduced.

SLIDE SHOWS

There were 15 slide shows reproduced and pulsed, 5 of these were recorded in the studio, edited, reproduced and pulsed.

RECORDING SESSIONS

There were 490 recording sessions which were edited and mastered.

Nova Scotia Garden Guide Series	174
Interviews	70
Gail Keddy, Home Economist	65
Weldon Smith, 4H Representative	65
Agriculture Representatives	65
Miscellaneous Recordings	51

REEL TO REEL TAPE REPRODUCTION

Weekly Radio Tapes Production

There were 1090 reel-to-reel tapes produced and sent to subscribing radio stations throughout the province.

From January 1, to September 30, 1988, 9 radio stations were subscribers, one to three cuts per tape weekly.

9 radio stations x 39 weeks = 351 tapes

From October 1, 1988 to March 31, 1989, we had 13 radio stations as subscribers. Each tape contained 2 interviews and 2 to 3 monologues.

13 radio stations x 26 weeks = 338 tapes

Agricultural Representatives Broadcasts

They consisted of one cut per week = 65 tapes

Radio Interviews

From mid-September 1988 to March 31, 1989, Laurie Thompson as hostess and myself as recording technician recorded 70 interviews. The interviews were edited to eliminate errors and stay within the allocated time. I have scheduled, researched and prepared information and tentative questions.

As of December 1988 the weekly radio tapes have been transcribed, typed, photocopied and forwarded to the Minister, Deputy Minister and the Directors for their information. This information process started when the new radio format started, October 1, 1988.

Nova Scotia Garden Guide Series

1989 is the 11th year for this radio series. We have 15 radio stations as regular subscribers. AVR consists of 4 stations and requires one tape.

12 radio stations x 26 weeks = 312 tapes
12 individualized promos (1988) = 12 tapes
12 individualized promos (1989) = 12 tapes

Recordings of 20 broadcasts along with individualized promos were produced for the 1989 season which will start April 17. The typing of scripts on Garden Guide letterhead, cut titles are typed on box covers and audio cassettes are reproduced and forwarded to Dick Morton for loan out purposes to garden clubs throughout the province.

EQUIPMENT

Over the past 15 months, this office has answered questions regarding equipment, specifications, has given instructions and provided assistance when equipment set up was required or when equipment problems were encountered on location.

As part of my duties, each piece of audio visual equipment borrowed is checked and cleaned when it is returned. Also regular maintenance, cleaning and demagnetizing is performed on radio recording equipment and audio visual equipment along with equipment received from other departments. Minor repairs were done on various equipment. There were 16 requests to set up equipment for previewing video cassettes and 16 mm films.

INVENTORY

Inventory equipment checks were done regularly along with deletions and additions.

BULK AUDIO VISUAL SUPPLIES ORDER

Once each year, this office prepares a bulk purchase order for audio visual supplies for all departments. In 1988, the order totalled \$8,700.00. These supplies are charged through inter-departmental invoicing and processed by the Accounting Department. The cost of the supplies transferred to other departments was \$6,648.34 as of February 1, 1989.

FOODSERVICE DIRECTORY-Computer

The entries were completed, double column, paging, editing, final corrections were made and a final printout ready for printing was sent out to the printer.

SURVEYS

Three surveys were conducted. One survey was conducted to determine the interest and needs of the radio stations before a new proposal was developed and presented for approval. A new radio format consisting of 2 interviews and monologues was developed and renamed "Nova Scotia Agriculture and Marketing Update". Then a second survey was conducted one month after the new series was aired for feedback from the stations. The comments were favorable. This provides the Department with more air time and this also allows more information to be passed on to the listening audience.

As well, a survey was completed to measure the effectiveness of the Garden Guide Series.

EQUIPMENT LOANS

<u>Equipment</u>	<u>Department</u>	<u>College</u>	<u>Total</u>
Ringmasters	24	29	49
Cameras	65	10	75
16mm Projectors	29	38	67
35mm Projectors	205	44	249
Overheads	117	39	156
Sound Systems	42	18	60
Tape Recorders	41	17	58
Super 8 Projector	--	3	3
Microwave & Video Equip.	14	7	21
Videos, slides, etc.	51	35	86
Screens, Flip Charts, Misc.	222	76	298
Term Loans of Equipment		77	77

Total			1199

submitted by:

Micheline Gibson
Audio Visual Technician